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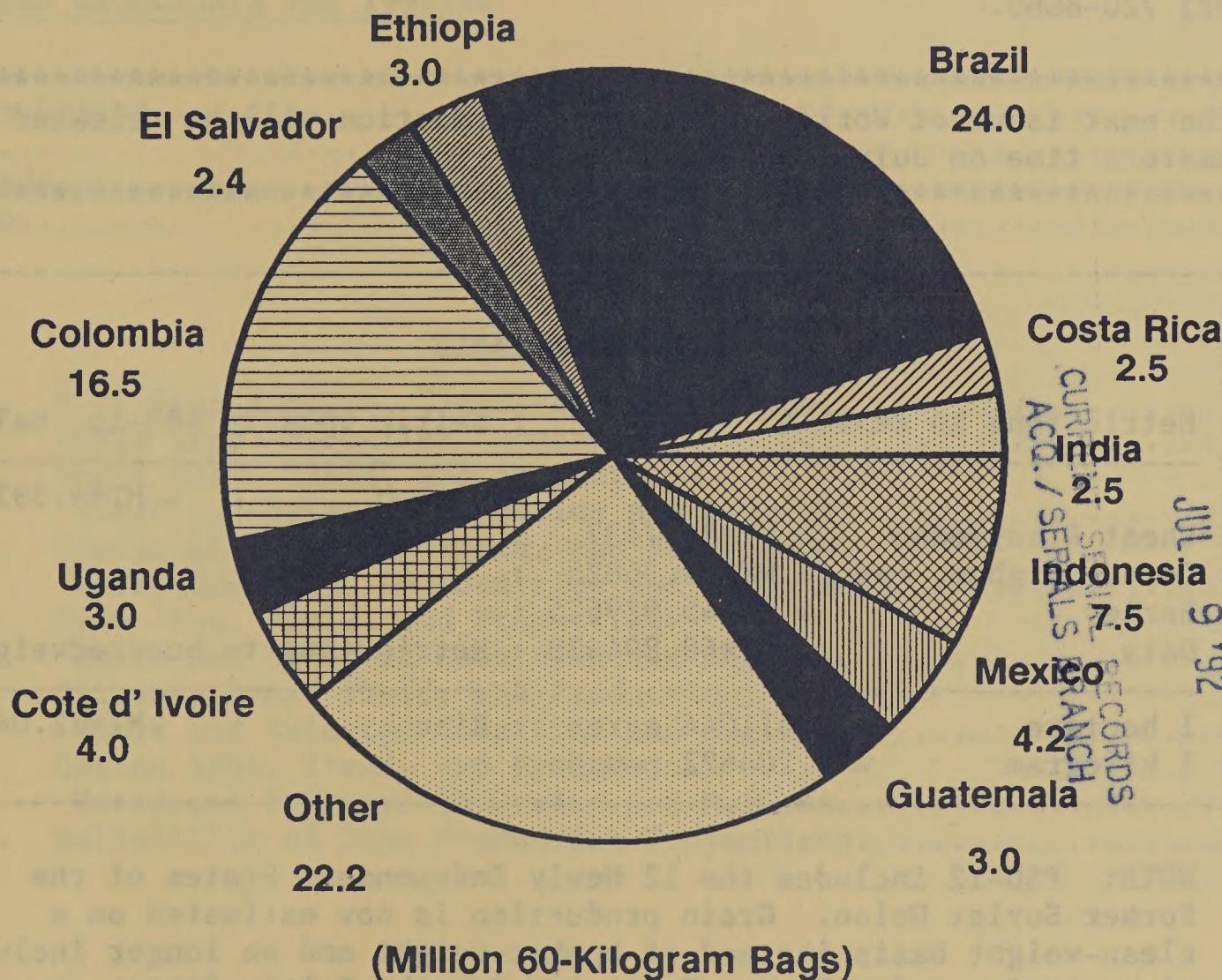


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United States
Department of
Agriculture
Foreign Agricultural
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Circular Series
WAP 6-92
June 1992

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World Agricultural Production

World Coffee Production 1992/93 Forecast



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Production Articles This Month...

- World Coffee
- World Tobacco
- World Sunflowerseed
- Saudi Grains
- Tomatoes for Processing
- Citrus in Selected Countries

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-267), June 10, 1992.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

* The next issue of World Agricultural Production will be released at 3 p.m. *
* Eastern time on July 10, 1992. *

CONVERSION TABLE

: Metric tons to bushels	: Metric tons to 480-lb. bales
: -----	: -----
: Cotton	= MT*4.592917
: Wheat & soybeans = MT*36.7437	:
: Corn, sorghum, rye = MT*39.36825	:
: Barley = MT*45.929625	:
: Oats = MT*68.894438	: Metric tons to hundredweight
: -----	: -----
: 1 hectare = 2.471044 acres	: Rice = MT*22.04622
: 1 kilogram = 2.204622 pounds	:

NOTE: FSU-12 includes the 12 Newly Independent States of the Former Soviet Union. Grain production is now estimated on a clean-weight basis instead of bunker-weight and no longer includes minor grains and pulses. Estimates for the Baltic States are now included in the "Others" category of the tables.

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PRODUCTION HIGHLIGHTS FOR 1992/93

June 1992

WHEAT: World production for 1992/93 is projected at 547.8 million tons, down 0.8 million or marginally lower than last month, but up 1 percent from the 1991/92 harvest. Total foreign production is projected at 488.3 million tons, up 1.4 million or marginally higher than last month and virtually unchanged from 1991. Country highlights are as follows:

- o **United States** Production is projected at 59.5 million tons, down 2.2 million or 4 percent from last month, but up 10 percent from 1991/92. The decline is due to the reduced forecast for winter wheat area and yields.
- o **Morocco** Production is projected at 1.4 million tons, down 0.9 million or 38 percent from last month and down 72 percent from 1991/92. The decrease is due to post-harvest information indicating that drought negatively impacted yield.
- o **South Africa** Production is projected at 1.2 million tons, down 0.3 million or 20 percent from last month and down 45 percent from 1991/92. Sown area in the Orange Free State and Transvaal is expected to decline due to severe drought during planting.
- o **China** Production is projected at 95.0 million tons, up 1.0 million or 1 percent from last month, but down 1 percent from 1991. The revision is based on higher estimated area and favorable late-season rainfall which ended drought in the North China Plain.
- o **Sudan** Production is projected at 0.8 tons, up 0.3 million or 50 percent from last month and up 44 percent from 1991. Favorable weather and plentiful irrigation supplies and inputs boosted estimated area and yield.
- o **Algeria** Production is projected at 1.6 million tons, up 0.3 million or 25 percent from last month, but down 7 percent from 1991. Estimated harvested area and yield increased as harvest results indicate that this year's drought was not as severe as previously expected.

COARSE GRAINS: World production for 1992/93 is projected at 837.2 million tons, up 3.2 million or slightly above last month and up 5 percent from 1991/92. Total foreign production is projected at 588.2 million tons, up 3.2 million or slightly from last month and 1 percent above 1991. Country highlights are as follows:

- o United States Production is projected at 249.0 million tons, unchanged from last month, but up 14 percent from 1991.
- o China Production is projected at 109.9 million tons, up 2.2 million or 2 percent from last month, but down 2 percent from last season's record crop. The corn estimate was raised 4.0 million tons to 96.0 million due to an increase in estimated planted area and higher forecast yield. This was partly offset by a 1.8 million ton reduction in estimated barley production, based on a revision in the historical production series.
- o Sudan Production is projected at 3.8 million tons, up 0.7 million or 23 percent from last month and up 17 percent from the 1991 harvest. The increase is due to improved sorghum yield resulting from favorable weather and plentiful irrigation supplies and inputs.
- o Algeria Production is projected at 1.6 million tons, up 0.5 million or 41 percent from last month, but down 15 percent from last season's harvest. The effect of the drought on barley and oat yields was not as severe as earlier expected.
- o Australia Production is projected at 7.3 million tons, up 0.4 million or 6 percent from last month, but down 3 percent from last year. The increase is due to higher estimated barley area and yield.
- o Peru Production is projected at 0.7 million tons, down 0.3 million or 27 percent from last month and down 15 percent from 1991/92. Corn area and yield were reduced due to inadequate irrigation water.
- o Poland Production is projected at 16.9 million tons, down 0.2 million or 1 percent from last month and down 9 percent from last season's near-record harvest. Rye output was estimated lower, while corn and oats were estimated marginally higher.

RICE (MILLED-BASIS): World production for 1992/93 is projected at 352.3 million tons, up 5.9 million or 2 percent from the 1991/92 crop. Total foreign production is projected at 347.0 million tons, up 5.6 million or 2 percent from 1991/92. U.S. output is projected at 5.3 million tons, up 0.3 million or 5 percent from last season.

OILSEEDS: World oilseeds production for 1992/93 is forecast at 223.0 million tons, unchanged from last month, but down less than 1 percent from 1991/92. Total foreign oilseed production is forecast at a record 161.4 million tons, up 2.0 million or 1 percent from last season. U.S. oilseed production is forecast at 61.6 million tons, down 2.8 million or 4 percent from 1991/92.

COTTON: World production for 1992/93 is projected at 94.0 million bales. This estimate is unchanged from last month, but is down 0.9 million or 1 percent from the current season's record output. Total foreign production is forecast at 76.8 million bales, also unchanged from last month, but is down 0.5 million or nearly 1 percent below the 1991/92 record. U.S. production is forecast at 17.2 million bales, down 0.4 million or 2 percent from 1991/92. The forecast is clouded by the recent cold, wet weather in the high plains of Texas.

PRODUCTION HIGHLIGHTS FOR 1991/92

June 1992

WHEAT: World production for 1991/92 is estimated at 542.2 million tons, up 0.5 million or marginally above last month's estimate. The higher figure largely reflects an upward revision in Australia.

COARSE GRAINS: World production for 1991/92 is estimated at 799.0 million tons, up 0.3 million or marginally above last month's estimate. The upward revision primarily is due to higher estimates for barley in Australia and China's corn production.

RICE (MILLED-BASIS): World production for 1991/92 is estimated at 346.4 million tons, down 2.0 million or slightly below last month's estimate. Total foreign production in 1991/92 is estimated at 341.4 million tons, down 2.0 million or slightly below last month's estimate. Country highlights are as follows:

o **China** Production is estimated at 128.7 million tons, down 1.5 million or 1 percent from last month and down 3 percent from the 1990 record crop. The new estimate reflects China's latest government statistics. Yields were lower than anticipated, but the crop is still the second largest.

o **Philippines** Production is estimated at 5.9 million tons, down 0.4 million or 6 percent from last month and down 8 percent from last year. Drought in the western Visayas and Mindanao negatively affected area and yield.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 223.8 million tons, down slightly or less than 1 percent from last month, but up 3 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 159.4 million tons, down slightly or less than 1 percent from last month, but up 1 percent from 1990. Total oilseed production in the United States is forecast at 64.4 million tons, unchanged from last month, but up 6 percent from 1990.

* **Soybeans:** World production for 1991/92 is estimated at 105.1 million tons, down 0.3 million or slightly below last month's estimate, but up less than 1 percent from 1990/91. Total foreign output is estimated at 51.1 million tons, down 0.3 million or 1 percent from last month and down 1 percent from 1990/91. Country highlights are as follows:

o United States

Production is estimated at 54.0 million tons, unchanged from last month, but up 3 percent from 1990. The National Agricultural Statistics Service, USDA, estimates yield at 2.3 tons per hectare from a harvested area of 23.5 million hectares.

o Paraguay

Production is estimated at 1.2 million tons, down 0.4 million or 25 percent from last month and down 8 percent from 1990. Adverse weather during the growing season and excessive rainfall at harvest lowered estimated yield.

o China

Production is estimated at 9.7 million tons, up 0.1 million or 1 percent from last month, but down 12 percent from 1990. Updated estimates from China's State Statistical Bureau lowered area and yield.

* **Cottonseed:** World production for 1991/92 is forecast at 36.7 million tons, up 0.2 million or slightly above last month and up 10 percent from 1990/91. Total foreign production is forecast at 30.5 million tons, up 0.2 million or less than 1 percent from last month and up 8 percent from 1990. Country highlights are as follows:

o United States

Production is estimated at 6.3 million tons, unchanged from last month, but up 16 percent from 1990/91. Official estimates by the National Agricultural Statistics Service peg expected yield at 1.20 tons per hectare and harvested area at 5.2 million hectares.

o India

Production is estimated at 4.0 million tons, up 0.1 million or 3 percent from last month and up 3 percent from 1990. The increase is due to higher estimated yield.

o Paraguay

Production is forecast at 0.3 million tons, down 0.1 million or 33 percent from last month, but up 6 percent from 1990/91. Harvested area and yield were reduced by poor growing conditions and excessive rainfall during harvest.

* **Peanuts:** World production for 1991/92 is forecast at 22.6 million tons, up marginally from last month and up 2 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, up marginally from last month, but down 1 percent from a season earlier. Country highlights are as follows:

o United States

Production is estimated at a record 2.2 million tons, unchanged from last month, but up 37 percent from 1990/91. The National Agricultural Statistics Service estimates yield at 2.74 tons per hectare from a record harvested area of 0.8 million hectares.

- o China Production is estimated at 6.3 million tons, up 0.1 million or 2 percent from last month, but down 1 percent from 1990. Although official Chinese government statistics reduced area slightly, yield was increased.
- * Sunflowerseed: World production for 1991/92 is estimated at 20.7 million tons, up 0.1 million from last month, but down 8 percent from 1990/91. Total foreign production is estimated at 19.0 million tons, up 0.1 million or slightly above last month, but down 12 percent from 1990. Country highlights are as follows:
 - o United States Production is estimated at 1.6 million tons, unchanged from last month, but up 59 percent from 1990/91. National Agricultural Statistics Service estimates yield at 1.51 tons per hectare from a harvested area of 1.081 million hectares.
 - o India Production is estimated at 1.1 million tons, up 0.1 million or 10 percent from last month and up 22 percent from 1990/91. Plantings rose 13 percent in response to strong domestic prices.
- * Rapeseed: World production for 1991/92 is estimated at a record 28.6 million tons, down marginally from last month, but up 14 percent from 1990/91. Total foreign production is estimated at 28.5 million tons, down less than 1 percent from last month, but up 14 percent from 1990. Country highlights are as follows:
 - o United States Production is estimated at 83,000 tons, unchanged from last month, but up 54 percent from 1990. NASS estimates yield at 1.3 tons per hectare from a harvested area of 58,000 hectares.
- * Flaxseed: World production for 1991/92 is estimated at 2.1 million tons, up marginally from last month, but down 7 percent from 1990/91. Total foreign production is pegged at 2.0 million tons, up less than 1 percent from last month, but down 10 percent from 1990/91. There were no significant country changes this month.
- * Copra: World production for 1991/92 is forecast at 4.5 million tons, up 0.1 million or 2 percent from last month, but down 6 percent from 1990/91. Country highlights are as follows:
 - o India Production is estimated at 450,000 tons, up 90,000 tons or 25 percent from last month and up 13 percent from 1990. The revised estimate reflects more favorable producer prices.
- * Palm Kernels: World production for 1991/92 is forecast at a record 3.5 million tons, unchanged from last month, but up 5 percent from 1990. There were no country changes this month.
- * Palm Oil: World production for 1991/92 is forecast at a record 11.7 million tons, down marginally from last month, but up 4 percent from 1990. There were no significant country changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 94.9 million bales. This estimate is down 0.2 million bales or less than 1 percent from last month, but up 9 percent from 1990/91. Total foreign production is projected at a record 77.3 million bales, down 0.2 million or less than 1 percent from last month, but up 8 percent over 1990/91. Country highlights are as follows:

- o United States Production is estimated at 17.6 million bales, unchanged from last month, but up 14 percent from 1990/91.
- o Paraguay Production is estimated at 0.7 million bales, down 0.4 million or 33 percent from last month and down 43 percent from 1990/91. Production was reduced by excessively dry conditions earlier in the season and heavy rainfall at harvest which lowered estimated area and yield.
- o Australia Production is estimated at 1.9 million bales, up 0.2 million or 9 percent from last month, but down 4 percent from the 1990 record production. Higher-than-expected yields contributed to the increase as excellent harvest conditions prevailed over most growing areas.
- o China Production is estimated at 26.1 million bales, up 0.1 million or less than 1 percent from last month and up 26 percent from 1990/91. The revision reflects the latest official production estimate from the Chinese government. A large increase in area and generally favorable weather led to the near-record crop.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	1990/91	Prel.	Proj.	1991/92	Prel.	Proj.	1990/91	1991/92	Prel.	1992/93 Proj.	Prel.	1992/93 Proj.
--Million acres--												
All Wheat	77.2	69.9	69.3	50.3	49.9	42.9	39.5	34.3	2,736	1,981	2,268	2,187
Winter	56.9	51.0	49.9	39.4	39.4	42.9	40.7	34.8	2,031	1,372	1,618	1,537
Other	20.3	18.9	19.4	18.3	18.3	18.3	36.4	33.3	706	609	650	650
Rye	1.6	1.7	0.4	0.4	0.4	0.4	27.1	24.6	10	10	10	10
Soybeans	57.8	59.1	56.5	58.0	58.0	58.0	34.0	34.3	1,926	1,986	1,915	1,915
Corn	74.2	76.0	67.0	68.8	68.8	68.8	118.5	108.6	7,934	7,474	8,575	8,575
Sorghum	10.5	11.0	9.1	9.8	9.8	9.8	63.1	59.0	573	579	700	700
Barley	8.2	8.9	7.5	8.4	8.4	8.4	56.1	55.2	422	464	420	420
Oats	10.4	8.7	5.9	4.8	4.8	4.8	60.1	50.6	358	243	275	275
--Pounds per acre--												
Rice	2.9	2.9	2.8	2.8	2.8	2.8	5,529	5,617	156.1	154.5	166.0	166.0
All Cotton	12.4	14.1	11.7	13.0	13.0	13.0	614	652	15.5	17.6	17.2	17.2

1/ Estimates from National Agricultural Statistics Service (NASS) for 1990/91, 1991/92 and winter wheat forecast for 1992/93.
 All other 1992/93 projections are from USDA Interagency Commodity Estimates Committees.

June 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			Asia			South America			Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe	China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey
—Million metric tons—																		
<u>Wheat</u>																		
1990/91	589.0	514.5	74.5	32.7	3.9	84.7	5.1	41.0	100.3	98.2	49.9	0.0	14.4	0.0	10.9	3.1	15.1	16.0
1991/92 prel.	542.2	488.3	53.9	32.8	3.7	90.0	4.1	38.3	72.3	96.0	54.5	0.0	14.6	0.0	9.0	3.0	10.6	2.2
1992/93 proj.	548.6	486.9	61.7	30.0	3.5	89.0	3.9	31.1	83.7	94.0	54.0	0.0	14.5	0.0	10.0	3.5	15.5	16.0
May	547.8	488.3	59.5	30.0	3.5	90.1	3.9	31.0	83.7	95.0	54.0	0.0	14.5	0.0	10.0	3.5	15.5	16.0
June																		17.9
<u>Coarse Grains</u>																		
1990/91	820.3	589.5	230.7	25.4	18.4	84.3	13.7	50.6	99.4	111.7	32.9	5.2	2.8	4.1	10.8	24.4	6.7	8.9
1991/92 prel.	799.0	580.5	218.5	22.7	17.2	89.4	12.3	64.5	72.9	112.3	29.1	5.3	2.3	3.8	14.1	29.3	7.5	2.9
1992/93 proj.	834.0	585.0	249.0	22.3	16.8	87.1	11.6	55.7	87.5	107.7	33.0	5.3	2.2	4.0	13.0	29.3	6.9	8.5
May	837.2	588.2	249.0	22.3	16.8	87.1	11.6	55.4	87.5	109.9	33.0	5.3	2.2	4.0	13.0	29.3	7.3	8.5
June																		85.5
<u>Rice (Milled)</u>																		
1990/91	352.3	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.4	132.5	74.6	29.4	3.3	11.3	0.3	6.5	0.5	0.0
1991/92 prel.	346.4	341.4	5.0	0.0	0.2	1.4	0.0	0.1	1.3	128.7	71.0	28.7	3.2	13.4	0.4	7.3	0.6	0.1
1992/93 proj.	352.3	347.0	5.3	0.0	0.2	1.6	0.0	0.1	1.4	132.5	74.6	29.4	3.3	13.4	0.4	7.3	0.6	0.1
May	352.3	347.0	5.3	0.0	0.2	1.6	0.0	0.1	1.4	132.5	74.6	29.4	3.3	13.4	0.4	7.3	0.6	0.1
June																		24.1
<u>Total Grains 1/</u>																		
1990/91	1,761.6	1,451.3	310.3	58.1	22.5	170.6	18.8	91.7	201.1	342.4	157.3	34.6	20.5	15.4	22.0	33.9	22.2	10.6
1991/92 prel.	1,687.6	1,410.1	277.4	55.5	21.1	180.8	16.4	102.9	146.5	337.0	154.7	34.0	20.1	17.2	23.5	39.6	18.7	5.1
1992/93 proj.	1,734.9	1,418.9	316.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	204.0
May	1,737.3	1,423.5	313.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	211.0
June																		
<u>Oilseeds 2/</u>																		
1989/90	214.3	155.0	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.4	2.2	3.3	0.9	15.8	21.6	0.7	1.0
1990/91 prel.	217.9	157.2	60.6	5.6	1.0	13.1	0.7	4.3	13.0	33.3	20.3	2.2	3.7	0.8	16.8	17.1	1.9	0.9
1991/92 proj.	223.9	159.4	64.4	6.5	1.2	13.7	0.7	4.2	11.6	34.0	21.0	2.2	4.7	0.7	14.8	20.1	1.0	0.4
May	223.8	159.4	64.4	6.5	1.2	13.6	0.7	4.2	11.6	34.2	21.2	2.2	4.7	0.7	14.8	20.1	1.0	0.4
June																		20.5
<u>Cotton</u>																		
1989/90	79.8	67.6	12.2	0.0	0.8	1.5	0.0	0.1	12.2	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	2.8
1990/91 prel.	86.9	71.4	15.5	0.0	0.8	1.3	0.0	0.1	11.9	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	3.0
1991/92 proj.	95.2	77.6	17.6	0.0	0.8	1.3	0.0	0.1	11.0	26.0	9.1	0.0	10.0	0.2	1.1	3.6	1.8	2.6
May	94.9	77.3	17.6	0.0	0.8	1.3	0.0	0.1	11.0	26.1	9.1	0.0	10.0	0.2	1.1	3.6	1.9	2.6
June																		9.4

1/ Includes total of wheat, coarse grains, and rice (milled) shown above.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

3/ Fmr. USSR covers the same area previously designated USSR for oilseeds and cotton. Wheat and coarse grains estimates represent FSU-12 only. See note at the bottom of page 2 referencing FSU-12.

Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3
Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	1991/92	Proj. 1992/93	Prel. 1990/91	1991/92	1992/93 Proj. May	June	Prel. 1990/91	1991/92	1992/93 Proj. May	June
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	231.9	221.6		2.54	2.45			589.0	542.2	548.6	547.8
United States	28.0	23.3		2.66	2.31			74.5	53.9	61.7	59.5
Total Foreign	203.8	198.2	199.6	2.52	2.46	2.44	2.45	514.5	488.3	486.9	488.3
Maj. Foreign Exporters	45.8	43.0	47.2	3.13	3.31	3.07	3.08	143.4	142.4	144.5	145.6
Argentina	5.7	4.5	5.5	1.91	2.00	1.82	1.82	10.9	9.0	10.0	10.0
Australia	9.2	7.2	10.2	1.63	1.48	1.52	1.52	15.1	10.6	15.5	15.5
Canada	14.4	14.5	14.8	2.27	2.26	2.03	2.03	32.7	32.8	30.0	30.0
EC-12	16.5	16.8	16.8	5.14	5.35	5.35	5.38	84.7	90.0	89.0	90.1
Major Importers	97.9	95.1	93.3	2.59	2.35	2.39	2.39	253.5	223.4	222.8	223.2
Brazil	3.3	2.1	2.3	0.94	1.43	1.52	1.52	3.1	3.0	3.5	3.5
China	30.8	30.9	30.7	3.19	3.10	3.08	3.10	98.2	96.0	94.0	95.0
Eastern Europe	9.8	9.9	8.5	4.20	3.88	3.72	3.65	41.0	38.3	31.1	31.0
Egypt	0.7	0.8	0.8	5.79	5.90	5.90	5.90	4.3	4.5	4.6	4.6
Other N. Africa 1/	5.4	5.6	5.0	1.04	1.55	0.97	0.90	5.7	8.6	5.1	4.5
Japan	0.3	0.2	0.2	3.66	3.18	3.58	3.58	1.0	0.8	0.9	0.9
FSU-12 2/	47.7	45.6	45.8	2.10	1.59	1.83	1.83	100.3	72.3	83.7	83.7
Other Foreign	60.1	60.2	59.0	1.96	2.03	2.02	2.02	117.7	122.4	119.6	119.5
India	23.5	24.0	23.4	2.12	2.27	2.31	2.31	49.9	54.5	54.0	54.0
Iran	6.5	6.7	6.8	1.26	1.34	1.25	1.25	8.2	8.9	8.5	8.5
Mexico	1.0	0.9	0.9	4.11	4.20	4.12	4.12	3.9	3.7	3.5	3.5
Non-EC W. Europe	0.9	0.8	0.8	5.41	5.18	5.20	5.20	5.1	4.1	3.9	3.9
Pakistan	7.8	7.9	7.8	1.84	1.84	1.86	1.86	14.4	14.6	14.5	14.5
South Africa	1.6	1.4	1.0	1.10	1.53	1.36	1.26	1.7	2.2	1.5	1.2
Turkey	8.8	8.8	8.8	1.83	1.87	1.82	1.82	16.0	16.5	16.0	16.0
Others	10.0	9.8	9.7	1.85	1.84	1.83	1.85	18.5	18.0	17.7	17.9

1/ Algeria, Libya, Morocco, and Tunisia.

2/ See note at the bottom of page 2 referencing the FSU-12. Production for the Baltic States in 1990/91, 1991/92, and 1992/93 is estimated at 1.6, 0.9, and 1.3 million metric tons, respectively.

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	Proj. 1991/92	Proj. 1992/93	Prel. 1990/91	1991/92	1992/93 Proj. May	June	Prel. 1990/91	1991/92	1992/93 Proj. May	June
TOTAL COARSE GRAINS	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World 1/	314.2	319.9		2.61	2.50			820.3	799.0	834.0	837.2
United States	36.4	37.3		6.34	5.85			230.7	218.5	249.0	249.0
Total Foreign	277.8	282.5	282.5	2.12	2.05	2.06	2.08	589.5	580.5	585.0	588.2
Maj. Foreign Exporters	20.2	21.0	21.3	2.76	2.42	2.58	2.59	55.8	51.0	54.7	55.1
Argentina	3.2	3.8	4.2	3.33	3.71	3.08	3.08	10.8	14.1	13.0	13.0
Australia	4.1	4.9	4.6	1.64	1.53	1.53	1.59	6.7	7.5	6.9	7.3
Canada	7.6	6.9	7.0	3.32	3.29	3.20	3.20	25.4	22.7	22.3	22.3
South Africa	3.7	3.9	4.0	2.40	0.74	2.13	2.13	8.9	2.9	8.5	8.5
Thailand	1.5	1.5	1.5	2.64	2.54	2.65	2.65	4.1	3.8	4.0	4.0
Major Importers	98.5	99.8	99.5	2.72	2.58	2.61	2.61	267.9	257.7	260.1	259.8
Eastern Europe	15.9	16.6	15.9	3.18	3.89	3.44	3.48	50.6	64.5	55.7	55.4
EC-12	19.4	19.0	18.5	4.36	4.70	4.71	4.71	84.3	89.4	87.1	87.1
Other W. Europe	3.0	2.9	2.8	4.51	4.29	4.15	4.15	13.7	12.3	11.6	11.6
Mexico	8.2	8.8	9.1	2.23	1.95	1.84	1.84	18.4	17.2	16.8	16.8
FSU-12 2/	51.6	52.1	52.8	1.93	1.40	1.66	1.66	99.4	72.9	87.5	87.5
Other Major Import. 3/	0.4	0.4	0.4	3.84	3.77	3.87	3.87	1.5	1.4	1.4	1.4
Other Foreign	159.1	161.7	161.7	1.67	1.68	1.66	1.69	265.8	271.8	270.2	273.2
Brazil	13.4	14.1	14.1	1.82	2.08	2.08	2.08	24.4	29.3	29.3	29.3
China	27.0	27.0	26.9	4.13	4.16	3.74	4.08	111.7	112.3	107.7	109.9
India	36.6	35.4	36.3	0.90	0.82	0.90	0.91	32.9	29.1	33.0	33.0
Indonesia	2.9	2.9	2.9	1.82	1.83	1.83	1.83	5.2	5.3	5.3	5.3
Nigeria	9.5	9.5	9.5	0.67	0.85	0.86	0.86	6.3	8.1	8.2	8.2
Philippines	3.9	3.5	3.9	1.32	1.30	1.26	1.26	5.1	4.5	4.9	4.9
Turkey	4.4	4.4	4.5	2.10	2.17	2.12	2.12	9.3	9.6	9.4	9.4
Others	61.5	64.9	63.6	1.15	1.13	1.15	1.15	70.9	73.6	72.3	73.2
BARLEY											
World	72.1	76.3		2.46	2.20			177.3	167.9	166.9	165.8
United States	3.0	3.4		3.02	2.97			9.2	10.1	9.1	9.1
Total Foreign	69.0	72.9	70.1	2.44	2.16	2.22	2.24	168.1	157.8	157.8	156.7
Australia	2.5	2.8	2.8	1.62	1.66	1.48	1.57	4.1	4.7	4.0	4.4
Canada	4.7	4.5	4.4	2.96	2.78	2.73	2.73	13.9	12.5	12.0	12.0
China	1.2	1.2	1.3	3.25	3.27	1.78	3.20	3.9	3.9	5.8	4.0
Eastern Europe	3.6	4.0	3.8	4.01	3.70	3.57	3.55	14.4	14.8	13.4	13.4
EC-12	12.3	12.0	11.7	4.12	4.26	4.31	4.31	50.8	51.3	50.5	50.5
Other W. Europe	1.5	1.5	1.5	4.37	4.05	3.97	3.97	6.4	6.2	6.0	6.0
Turkey	3.4	3.4	3.4	1.94	2.00	1.91	1.91	6.6	6.8	6.5	6.5
FSU-12 2/	25.2	27.5	25.8	1.98	1.32	1.62	1.62	50.0	36.3	41.9	41.9
Others	14.6	16.0	15.4	1.23	1.33	1.22	1.16	18.0	21.2	17.5	17.9

FOOTNOTES AT END OF TABLE.

June 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION					
	Prel. 1990/91	Proj. 1991/92	Proj. 1992/93	Prel. 1990/91	1991/92	1992/93	Proj. May	Proj. June	Prel. 1990/91	1991/92	1992/93	Proj. May	Proj. June
CORN	---Million hectares---			---Metric tons per hectare---				---Million metric tons---					
World	127.2	130.5		3.75	3.70			477.2	483.5	509.2	512.9		
United States	27.1	27.9		7.44	6.82			201.5	189.9	217.8	217.8		
Total Foreign	100.1	102.6	104.4	2.75	2.86	2.79	2.83	275.7	293.6	291.3	295.1		
Maj. Foreign Exporters	6.3	7.0	7.4	3.11	2.40	2.88	2.88	19.7	16.7	21.2	21.2		
Argentina	2.0	2.4	2.7	3.90	4.38	3.52	3.52	7.6	10.5	9.5	9.5		
South Africa	3.0	3.3	3.4	2.74	0.80	2.39	2.39	8.3	2.6	8.0	8.0		
Thailand	1.4	1.3	1.3	2.81	2.73	2.82	2.82	3.8	3.6	3.7	3.7		
Major Importers	19.7	21.4	22.3	3.43	4.01	3.67	3.67	67.6	86.1	81.7	81.8		
Eastern Europe	6.4	6.7	6.8	3.02	5.01	4.12	4.11	19.4	33.7	27.8	27.9		
EC-12	3.5	3.9	3.7	6.27	6.87	6.89	6.89	21.9	26.5	25.6	25.6		
Other W. Europe	0.2	0.2	0.2	8.18	8.41	8.07	8.07	1.9	1.8	1.7	1.7		
Mexico	6.6	7.7	8.0	2.14	1.88	1.75	1.75	14.1	14.5	14.0	14.0		
FSU-12 2/	2.9	2.8	3.5	3.46	3.18	3.46	3.46	9.9	9.0	12.1	12.1		
Other Maj. Import. 3/	0.1	0.1	0.1	4.99	4.54	4.78	4.78	0.5	0.5	0.5	0.5		
Other Foreign	74.0	74.2	74.7	2.54	2.57	2.52	2.57	188.3	190.9	188.4	192.1		
Brazil	12.9	13.6	13.6	1.84	2.10	2.10	2.10	23.7	28.5	28.5	28.5		
Canada	1.0	1.1	1.1	6.91	6.75	6.60	6.60	7.2	7.3	7.0	7.0		
China	21.4	21.6	21.5	4.52	4.58	4.30	4.47	96.8	98.8	92.0	96.0		
Egypt	0.8	0.7	0.9	5.47	6.24	5.75	5.75	4.6	4.4	5.0	5.0		
India	6.0	5.7	5.8	1.52	1.47	1.55	1.55	9.1	8.4	9.0	9.0		
Indonesia	2.9	2.9	2.9	1.82	1.83	1.83	1.83	5.2	5.3	5.3	5.3		
Philippines	3.9	3.5	3.9	1.32	1.30	1.26	1.26	5.1	4.5	4.9	4.9		
Zimbabwe	1.1	0.9	1.0	1.44	0.59	1.60	1.60	1.6	0.5	1.6	1.6		
Others	24.1	24.3	24.1	1.46	1.36	1.45	1.45	35.1	33.1	35.1	34.8		
SORGHUM													
World	38.8	39.3		1.35	1.30			52.4	51.2	56.9	57.6		
United States	3.7	4.0		3.96	3.70			14.6	14.7	17.8	17.8		
Total Foreign	35.1	35.4	35.7	1.08	1.03	1.09	1.12	37.9	36.5	39.1	39.8		
Argentina	0.7	0.7	0.8	3.33	3.47	3.07	3.07	2.3	2.5	2.3	2.3		
Australia	0.4	0.6	0.6	2.22	1.72	2.00	2.00	0.9	1.1	1.2	1.2		
China	1.5	1.4	1.5	3.67	3.50	3.52	3.52	5.7	4.9	5.1	5.1		
India	14.5	13.7	14.5	0.82	0.70	0.81	0.83	11.9	9.6	12.0	12.0		
Mexico	1.3	0.8	0.8	2.85	2.75	2.93	2.93	3.7	2.2	2.2	2.2		
Nigeria	4.4	4.4	4.4	0.64	0.80	0.84	0.84	2.8	3.5	3.7	3.7		
South Africa	0.1	0.1	0.1	2.09	0.70	2.00	2.00	0.2	0.1	0.3	0.3		
Sudan	3.0	4.2	4.1	0.50	0.69	0.68	0.85	1.5	2.9	2.8	3.5		
Thailand	0.2	0.2	0.2	1.42	1.06	1.39	1.39	0.3	0.2	0.3	0.3		
Others	9.0	9.2	8.8	0.97	1.03	1.05	1.05	8.7	9.5	9.3	9.3		

FOOTNOTES AT END OF TABLE.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	Proj. 1991/92	Proj. 1992/93	Prel. 1990/91	1991/92	1992/93 Proj. May	June	Prel. 1990/91	1991/92	1992/93 Proj. May	June
OATS	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	21.1	20.5		1.88	1.59			39.7	32.5	33.7	33.8
United States	2.4	1.9		2.16	1.81			5.2	3.5	4.0	4.0
Total Foreign	18.7	18.6	18.1	1.84	1.56	1.65	1.65	34.5	29.0	29.7	29.8
FSU-12 2/	10.4	10.5	10.3	1.46	1.15	1.30	1.30	15.1	12.1	13.4	13.4
Maj. Foreign Exporters	2.9	2.9	2.9	2.16	1.80	1.97	1.97	6.4	5.3	5.8	5.8
Argentina	0.3	0.4	0.4	1.34	1.14	1.29	1.29	0.4	0.4	0.5	0.5
Australia	1.1	1.3	1.1	1.43	1.15	1.36	1.36	1.5	1.5	1.5	1.5
Canada	1.2	0.9	1.1	2.34	2.14	2.18	2.18	2.9	1.9	2.4	2.4
Sweden	0.4	0.3	0.4	4.42	4.13	3.73	3.73	1.6	1.4	1.4	1.4
Other Foreign	5.4	5.1	4.8	2.41	2.26	2.19	2.21	13.0	11.6	10.5	10.7
China	0.6	0.6	0.5	1.18	1.18	1.19	1.19	0.7	0.7	0.6	0.6
Eastern Europe	1.2	1.2	1.2	2.69	2.45	2.22	2.34	3.3	3.0	2.6	2.7
Czechoslovakia	0.1	0.1	0.1	4.55	4.00	3.57	3.57	0.4	0.4	0.3	0.3
Poland	0.7	0.7	0.7	2.84	2.73	2.50	2.73	2.1	1.9	1.8	1.8
EC-12	1.6	1.4	1.3	3.05	3.20	3.15	3.15	5.0	4.4	4.1	4.1
France	0.2	0.2	0.2	3.88	4.23	4.12	4.12	0.8	0.7	0.7	0.7
Germany	0.6	0.4	0.4	3.93	4.92	4.61	4.61	2.4	1.9	1.8	1.8
Finland	0.5	0.3	0.3	3.67	3.37	3.36	3.36	1.7	1.2	1.1	1.1
Norway	0.1	0.1	0.1	4.38	3.97	3.50	3.50	0.6	0.5	0.4	0.4
Others	1.4	1.5	1.4	1.31	1.29	1.26	1.26	1.8	1.9	1.7	1.8
RYE											
World	16.0	13.1		2.31	1.94			37.0	25.5	29.2	28.9
United States	0.2	0.2		1.70	1.55			0.3	0.2	0.3	0.3
Total Foreign	15.8	13.0	14.7	2.32	1.95	1.95	1.95	36.7	25.2	28.9	28.6
FSU-12 2/	10.2	8.3	10.2	2.08	1.49	1.64	1.64	21.2	12.3	16.7	16.7
Maj. Foreign Exporter											
Canada	0.4	0.2	0.2	1.70	1.86	1.72	1.72	0.7	0.4	0.3	0.3
Other Foreign											
Eastern Europe	2.7	2.6	2.4	2.67	2.59	2.47	2.50	7.2	6.8	6.2	5.9
Hungary	0.1	0.1	0.1	2.46	2.38	2.86	2.86	0.2	0.2	0.2	0.2
Poland	2.3	2.3	2.1	2.61	2.58	2.44	2.48	6.0	5.9	5.5	5.2
Czechoslovakia	0.2	0.1	0.1	4.26	3.80	3.80	3.80	0.7	0.5	0.4	0.4
EC-12	1.6	1.2	1.1	3.40	3.68	3.54	3.54	5.3	4.4	4.1	4.1
Denmark	0.1	0.1	0.1	4.95	5.24	4.71	4.71	0.5	0.4	0.4	0.4
Germany	1.0	0.7	0.7	3.87	4.66	4.48	4.48	4.0	3.3	3.0	3.0
Others	1.0	0.7	0.8	2.44	1.97	1.99	1.99	2.3	1.4	1.6	1.6

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain. 2/ See note at the bottom of page 2 referencing the FSU-12. Total coarse grains production for the Baltic States in 1990/91, 1991/92, and 1992/93 is estimated at 3.9, 4.0, and 4.0 million metric tons, respectively. 3/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

^{1/} Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.
^{2/} See note at the bottom of page 2 referencing the FSU-12.

2/ See note at the bottom of page 2 referencing the FSU-12.

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. May	June	Prel. 1989/90	1990/91	1991/92 Proj. May	June
---Million hectares---											
---Metric tons per hectare---											
SOYBEANS											
World	58.37	54.09	54.55	1.84	1.92	1.93	1.93	107.37	103.99	105.42	105.09
United States	24.09	22.87	23.45	2.17	2.29	2.30	2.30	52.35	52.42	54.04	54.04
Total Foreign	34.27	31.22	31.10	1.61	1.65	1.65	1.64	55.01	51.58	51.38	51.05
Maj. Foreign Exporters	16.35	14.45	14.80	1.90	1.89	1.95	1.95	31.09	27.25	28.80	28.80
Argentina	4.95	4.80	4.80	2.17	2.40	2.15	2.15	10.75	11.50	10.30	10.30
Brazil	11.40	9.65	10.00	1.78	1.63	1.85	1.85	20.34	15.75	18.50	18.50
Other Foreign	17.92	16.77	16.30	1.33	1.45	1.38	1.37	23.92	24.33	22.58	22.25
Canada	0.54	0.49	0.58	2.26	2.63	2.44	2.44	1.22	1.29	1.41	1.41
China	8.06	7.56	7.05	1.27	1.46	1.36	1.38	10.23	11.00	9.60	9.71
Eastern Europe	0.70	0.34	0.25	0.97	1.06	1.34	1.34	0.68	0.36	0.34	0.34
EC-12	0.63	0.69	0.51	3.13	3.10	3.11	3.19	1.98	2.14	1.68	1.63
India	2.25	2.37	2.60	0.80	1.02	0.85	0.85	1.81	2.42	2.20	2.20
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.33	1.58	1.30	1.60	1.20
Fmr. USSR 1/	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.73	2.39	2.36	1.53	1.52	1.49	1.51	4.17	3.63	3.55	3.55
COTTONSEED											
World	31.45	32.95	34.52	0.98	1.02	1.06	1.06	30.76	33.55	36.59	36.74
United States	3.86	4.75	5.25	1.10	1.14	1.20	1.20	4.24	5.42	6.28	6.28
Total Foreign	27.59	28.20	29.27	0.96	1.00	1.04	1.04	26.52	28.14	30.30	30.46
China	5.20	5.59	6.54	1.24	1.37	1.52	1.48	6.44	7.67	9.62	9.66
India	7.33	7.36	7.27	0.60	0.53	0.54	0.55	4.40	3.90	3.90	4.00
Pakistan	2.60	2.66	2.88	1.12	1.23	1.51	1.51	2.91	3.28	4.36	4.36
Fmr. USSR 1/	3.33	3.17	3.00	1.53	1.54	1.45	1.45	5.11	4.88	4.35	4.35
Others	9.13	9.43	9.59	0.84	0.89	0.83	0.84	7.66	8.42	8.08	8.09
PEANUTS											
World	19.82	19.39	19.95	1.11	1.15	1.13	1.13	22.06	22.22	22.59	22.61
United States	0.67	0.73	0.82	2.72	2.23	2.74	2.74	1.81	1.63	2.24	2.24
Total Foreign	19.15	18.66	19.13	1.06	1.10	1.06	1.07	20.25	20.59	20.36	20.37
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.88	1.81	2.19	2.08	2.19	5.37	6.37	6.20	6.30
India	8.71	8.30	8.75	0.93	0.92	0.86	0.86	8.10	7.62	7.50	7.50
Senegal	0.78	0.91	0.87	1.04	0.74	0.83	0.83	0.82	0.67	0.72	0.72
South Africa	0.09	0.09	0.20	1.28	1.30	0.56	0.57	0.11	0.11	0.11	0.12
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.72	5.70	0.87	0.88	0.88	0.86	5.12	5.02	5.02	4.93

FOOTNOTES AT END OF TABLE.

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.	Proj.		Prel.	1991/92 Proj.		Prel.	1991/92 Proj.			
	1989/90	1990/91	1991/92	1989/90	1990/91	May	June	1989/90	1990/91	May	June
<u>SUNFLOWERSEED</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	15.64	16.39	16.40	1.40	1.38	1.25	1.26	21.89	22.58	20.59	20.67
United States	0.72	0.75	1.08	1.10	1.38	1.51	1.51	0.80	1.03	1.64	1.64
Total Foreign	14.92	15.65	15.32	1.41	1.38	1.23	1.24	21.09	21.55	18.95	19.03
Argentina	2.80	2.30	2.50	1.36	1.70	1.32	1.32	3.80	3.90	3.30	3.30
China	0.72	0.71	0.75	1.49	1.88	1.47	1.47	1.06	1.34	1.10	1.10
EC-12	2.13	2.60	2.35	1.67	1.63	1.66	1.68	3.54	4.25	3.99	3.95
East Europe	1.27	1.23	1.27	1.81	1.71	1.73	1.73	2.29	2.10	2.19	2.19
Fmr. USSR 1/	4.46	4.67	4.50	1.59	1.41	1.25	1.25	7.07	6.56	5.64	5.64
Others	3.55	4.14	3.95	0.94	0.82	0.69	0.72	3.33	3.40	2.73	2.86
<u>RAPESEED</u>											
World	17.11	18.25	20.53	1.28	1.38	1.40	1.39	21.87	25.15	28.66	28.60
United States	0.03	0.03	0.06	1.58	1.74	1.43	1.43	0.05	0.05	0.08	0.08
Total Foreign	17.08	18.22	20.48	1.28	1.38	1.39	1.39	21.82	25.10	28.57	28.52
Canada	2.90	2.58	3.27	1.07	1.27	1.32	1.32	3.10	3.28	4.30	4.30
China	4.99	5.50	6.10	1.09	1.26	1.22	1.22	5.44	6.96	7.44	7.44
EC-12	1.81	2.13	2.44	2.96	2.88	3.05	3.01	5.34	6.15	7.39	7.34
East Europe	0.81	0.74	0.71	2.66	2.39	2.28	2.28	2.15	1.76	1.63	1.63
India	4.97	5.72	6.30	0.83	0.90	0.95	0.95	4.13	5.15	6.00	6.00
Others	1.60	1.54	1.66	1.04	1.17	1.06	1.09	1.68	1.80	1.82	1.81
<u>FLAXSEED</u>											
World	3.68	3.74	3.41	0.50	0.61	0.61	0.62	1.84	2.27	2.09	2.11
United States	0.07	0.10	0.14	0.47	0.95	1.14	1.14	0.03	0.10	0.16	0.16
Total Foreign	3.62	3.64	3.28	0.50	0.60	0.59	0.59	1.81	2.18	1.94	1.95
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.53	0.83	1.29	1.30	1.30	0.50	0.94	0.69	0.69
India	1.12	1.15	1.10	0.29	0.30	0.32	0.32	0.33	0.34	0.35	0.35
Fmr. USSR 1/	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.38	0.67	0.77	0.97	0.98	0.24	0.26	0.36	0.37
<u>MAJOR OILSEEDS</u>	146.07	144.82	149.36	1.41	1.45	1.44	1.44	205.79	209.78	215.93	215.81
United States	29.44	29.23	30.79	2.01	2.07	2.09	2.09	59.29	60.65	64.43	64.43
Total Foreign	116.63	115.58	118.57	1.26	1.29	1.28	1.28	146.50	149.13	151.50	151.38
<u>COPRA</u>	--	--	--	--	--	--	--	5.13	4.79	4.43	4.52
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.33	3.32	3.50	3.50
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	214.25	217.89	223.86	223.83
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	10.92	11.24	11.69	11.68

1/ Fmr. USSR covers the same area previously designated USSR. 2/ Not included in total oilseeds.

TABLE 7
Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92	Prel. May	1991/92 Proj. June	Prel. 1989/90	Proj. 1990/91	Proj. May
	---Million hectares---			---Kilograms per hectare---				---Million 480-pound bales---			
World	31.5	33.0	34.4	552	573	605	601	79.8	86.9	95.2	94.9
United States	3.9	4.7	5.2	688	711	731	731	12.2	15.5	17.6	17.6
Total Foreign	27.6	28.2	29.2	533	550	582	577	67.6	71.4	77.6	77.3
Maj. Foreign Exporters	13.1	13.2	14.2	725	790	845	837	43.5	48.0	54.3	54.5
Australia	0.2	0.3	0.3	1,271	1,604	1,422	1,467	1.4	2.0	1.8	1.9
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.5	728	807	891	869	17.4	20.7	26.0	26.1
Egypt	0.4	0.4	0.4	683	719	816	816	1.3	1.4	1.4	1.4
Mexico	0.2	0.2	0.3	891	914	707	707	0.8	0.8	0.8	0.8
Pakistan	2.6	2.7	2.9	560	615	756	756	6.7	7.5	10.0	10.0
Sudan	0.3	0.2	0.2	456	422	494	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	947	947	2.8	3.0	2.6	2.6
Fmr. USSR 2/	3.3	3.2	3.0	796	818	800	800	12.2	11.9	11.0	11.0
Major Importers 3/	0.4	0.4	0.3	887	785	859	859	1.5	1.4	1.4	1.4
Other Foreign	14.2	14.6	14.6	346	327	325	320	22.5	21.9	22.0	21.5
Argentina	0.6	0.6	0.6	486	468	404	399	1.3	1.4	1.2	1.1
Brazil	1.9	2.0	2.1	347	352	376	376	3.0	3.2	3.6	3.6
India	7.3	7.4	7.3	315	270	274	274	10.6	9.1	9.1	9.1
Syria	0.2	0.2	0.2	930	928	979	979	0.7	0.7	0.9	0.9
Others	4.2	4.5	4.5	359	366	347	329	6.9	7.6	7.3	6.8

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Fmr. USSR covers the same area previously designated USSR.

3/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

TABLE 8

The table below presents a 11-year record of the difference between the June projections and the final estimates. Using world wheat production as an example, changes between the June projection and the final estimate have averaged 16.3 million tons (3.2 percent) and ranged from -25.1 to 20.4 million tons. The June projection has been below the final 6 times and above the final 5 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1991/92 1/						
	Difference		Lowest	Highest	Below Final	Above Final	
	Average	Average	Difference		Number of years 2/		
<i>WHEAT</i>	Percent	<i>---Million metric tons---</i>					
World	3.2	16.3	-25.1	20.4	6	5	
U.S.	3.8	2.3	-4.2	8.4	6	5	
Foreign	3.4	15.1	-26.2	17.5	6	5	
<i>COARSE GRAINS 3/</i>		<i>---Million metric tons---</i>					
World	3.5	26.9	-31.4	76.0	5	6	
U.S.	12.7	23.4	-30.2	70.3	4	7	
Foreign	2.0	10.9	-20.6	28.6	4	7	
<i>RICE (Milled)</i>		<i>---Million metric tons---</i>					
World	3.0	9.3	-21.8	11.4	8	3	
U.S.	6.0	0.3	-1.1	0.5	6	5	
Foreign	3.0	9.3	-21.9	11.2	8	3	
<i>SOYBEANS</i>		<i>---Million 480-lb. bales---</i>					
World	N/A	N/A	N/A	N/A	N/A	N/A	
U.S.	8.3	4.1	-6.5	12.0	6	5	
Foreign	N/A	N/A	N/A	N/A	N/A	N/A	
<i>COTTON</i>		<i>---Million 480-lb. bales---</i>					
World	4.2	3.4	-13.9	5.6	7	3	
U.S.	10.0	1.3	-2.8	1.3	6	5	
Foreign	3.5	2.4	-12.4	4.3	7	4	
<i>UNITED STATES</i>		<i>---Million bushels---</i>					
<i>CORN</i>	13.4	787	-990	2,379	4	7	
<i>SORGHUM</i>	16.0	116	-228	171	6	5	
<i>BARLEY</i>	12.8	51	-73	206	6	5	
<i>OATS</i>	21.4	67	-77	231	3	8	

1/ The final estimate for 1981/82-1990/91 is defined as the first November estimate following the marketing year.

2/ May not total 11 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

JUNE 10, 1992



1 - UNITED STATES

Spring planting surges well ahead of normal but dryness hampers late germination in the central Corn Belt. A late-May record freeze damaged some HRW wheat and burned early corn leaf growth. Rain delays HRW wheat harvest in the southern Great Plains and hampers cotton growth and completion of planting.

2 - CANADA

Predominantly cool, wet weather improves Prairies moisture reserves but slows planting and germination. More rain is needed in the southwest for establishment. Frost causes isolated damage to spring crops.

3 - SOUTH AMERICA

In Argentina, earlier scattered heavy rains cause some harvest delays, but recent excellent weather prevails for summer crop harvesting and winter grain planting. Across southern Brazil, persistent heavy rains delay soybean harvesting, cause possible soybean and winter wheat damage, and produce flooding.

4 - EUROPE

Widespread early June rain helps immature winter grains and summer crops. Dry weather persists in the northeast and along the Mediterranean region.

5 - UNITED STATES

Widespread beneficial rain covers crops in Ukraine and North Caucasus. Dry weather continues over central crop areas.

6 - NEW LANDS

In the New Lands, while moisture for spring grain planting is much better than last year, unseasonably cold weather slows crop emergence.

7 - SOUTH ASIA

The monsoon is becoming established over southern and eastern India. Beneficial rain in these areas helps summer grain, oilseed, and cotton planting prospects.

8 - EASTERN ASIA

Warm, dry weather depletes topsoil moisture for germinating summer crops in the North China Plain. The dryness also stresses rainfall filling winter wheat. Recent rain favors topsoils in Manchuria. In southern China, heavy rains flood the southern coast, while rice irrigation supplies remain adequate to abundant. Portions of the lower Yangtze basin have been receiving below normal rainfall.

9 - SOUTHEAST ASIA

Following timely mid-May planting rains, hot, dry weather stresses Thailand's western corn and northern rice. Seasonable showers finally reach the northern Philippines but drought persists elsewhere.

10 - AUSTRALIA

Topsoil moisture is becoming limited for western winter grains. In the east, scattered showers aid topsoils. Winter grain planting progresses on schedule.

(More details are available in the *Weekly Weather and Crop Bulletin*. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

EUROPE: RAINS RELIEVE DROUGHT

Rainfall was widespread and frequent during May 11 - June 10, 1992 across most of Europe, boosting top soil moisture and improving conditions for summer crop establishment. This wet pattern eliminated persistently dry conditions across the northern Iberian Peninsula, Italy's Po Valley, western Hungary, and the Balkans. In contrast, dry conditions developed across Poland. No significant amounts of rain fell across Poland during May 17 - June 8, 1992. However, moderate rain fell across the eastern third of Poland on June 9, somewhat easing the recent dryness.

AUSTRALIA: SOIL MOISTURE ADEQUATE FOR WINTER GRAINS

Soil moisture, as of June 10, 1992, is adequate for the emergence and early growth of winter grains across the main growing regions of Australia. Rainfall during April 1 - June 10, 1992 was normal-to-above normal across the western and eastern growing regions and near normal in South Australia. Winter grain planting usually begins in mid-May and should be well under way by June 10. Soil moisture in Queensland and New South Wales is greater than last year at this time, allowing for a more favorable start for winter grains. Dry conditions across Western Australia during the June 1 - 10, 1992 have favored planting. However, rainfall will be needed soon before topsoils become too dry.

CANADA: SOIL MOISTURE ADEQUATE FOR WHEAT EMERGENCE

Soil moisture, as of June 10, 1992, is adequate for the emergence and early growth of spring wheat across the Prairie Provinces of Canada. Precipitation during May 11 - June 10 has averaged 10-25 millimeters per week across most of the primary grain growing areas. Precipitation has been lightest across southern Saskatchewan and southeast Alberta -- soils are probably becoming too dry. Growing conditions are less favorable than last year at this time. Last year the Prairie spring wheat crop greatly benefited from above normal rainfall which began in mid-April. Drier weather this year has allowed for rapid planting progress. Spring wheat planting was 90 percent complete by June 6.

PRODUCTION BRIEFS

BANGLADESH: BORO RICE CROP HIGHER, AUS CROP LOWER

The U.S. agricultural counselor in New Delhi reports that the 1991/92 Bangladesh rice crop is estimated at 18.4 million tons (milled-basis), unchanged from last month's estimate. The boro (spring harvested) rice crop has been revised upward by 0.2 million tons, to 6.6 million. Field reports indicate that the boro rice crop is larger than last season due to a 30-percent increase in the sale of irrigation equipment and a 60-percent increase in sales of high-yielding variety seeds by the Bangladesh Agricultural Development Corporation. The increase in the boro crop was offset by a decline in the aus (summer harvested) crop which was reduced 0.2 million tons, to 2.3 million due to lower-than-expected area. The estimated aman (fall harvested) crop remains unchanged at 9.5 million tons.

CHINA: REVISED BARLEY SERIES

China's barley area, yield, and production series from 1960 through 1992 has been revised by USDA analysts. Since barley statistics are not regularly gathered or published in China, this is the first major revision in several years. The new series significantly lowers area and production from previous estimates, but raises yields.

	<u>Area</u> (1,000 Hectares)	<u>Yield</u> (Metric tons/Hectare)	<u>Production</u> (1,000 Metric tons)
1960	4,550	0.78	3,542
1961	5,260	1.13	5,954
1962	5,475	1.02	5,570
1963	4,298	1.15	4,928
1964	3,991	1.49	5,964
1965	3,811	1.50	5,714
1966	3,797	1.59	6,038
1967	3,394	1.73	5,865
1968	3,307	1.44	4,770
1969	3,229	1.37	4,426
1970	3,113	1.51	4,687
1971	2,902	1.72	4,982
1972	2,746	1.56	4,284
1973	2,641	1.22	3,228
1974	2,385	1.72	4,107
1975	1,972	1.96	3,858
1976	2,094	2.08	4,365
1977	2,032	1.92	3,911
1978	1,908	2.37	4,520
1979	1,876	2.65	4,805
1980	1,750	2.41	4,211
1981	1,711	2.56	4,379
1982	1,594	2.76	4,401
1983	1,564	2.68	4,187
1984	1,501	2.99	4,483
1985	1,351	2.84	3,831
1986	1,288	2.68	3,453
1987	1,285	2.89	3,717
1988	1,252	3.19	3,990
1989	1,218	2.93	3,571
1990	1,208	3.25	3,930
1991	1,200	3.27	3,928
1992	1,250	3.20	4,000

INDIA: GROWTH SLOWS IN POULTRY SECTOR

Output of poultry meat in 1992 is forecast to total 383,000 tons, 6 percent above the 1991 level, according to the U.S. agricultural counselor in New Delhi. In 1990 and 1991, production increases were 16 and 8 percent, respectively. The slower rate of growth is due to a late 1991 decline in wholesale broiler prices caused by reduced demand. Published price data indicates that the December 1991 wholesale price was 19 percent below the December 1990 average. This price decline, coupled with higher feed prices, has forced many small producers to suspend broiler production. In recent weeks, prices have begun to improve, creating optimism that some expansion will occur by the end of the year.

KUWAIT: DAIRY SECTOR RESUMES OPERATIONS

Prior to August 1990, Kuwait had a national dairy herd of about 20,000 cows on 35 farms, according to the U.S. agricultural trade officer in Bahrain. Most of the cows were Friesians, Holstein-Friesians, Jerseys, and other dairy breeds mainly imported from Europe and, to a lesser extent, from Australia. Most of the dairy farms were located in the Sulaybia area, about 20 kilometers west of Kuwait City. Raw milk was processed by the Kuwait Dairy Company, a cooperative, and the only fresh milk processing facility in the country. The purchase price for milk was set by the Government.

Kuwait's entire dairy cattle herd was lost during the Gulf War. Dairy farms and processing plants sustained serious damage to both property and equipment. However, by early March 1992, the Kuwait Dairy Company and 8 of the original 35 dairy farms were again operational. These farms have been completely rehabilitated and stocked with approximately 2,500 head of imported dairy cattle, mainly registered Holstein-Friesians from Germany. It is expected that additional dairy farms will resume operations in the near future. Preliminary assessments indicate that Kuwait's national herd may total 6,000-9,000 head by the end of 1992.

PERU: DROUGHT EXPECTED TO REDUCE RICE AND CORN CROPS

Peruvian rice and corn crops for 1992/93 are expected to be lower due to one of the worst droughts in recent history, according to the U.S. agricultural attache in Lima. Usually, the rainy season begins in October and lasts through April. However, this year the rains did not begin until late March. This has resulted in planted area reductions because the highland reservoirs which supply irrigation water to the dry coastal valleys are at record low levels.

The main rice crop has been adversely affected and both harvested area and production are expected to decline. Normally, the main rice crop is planted from December to March and harvested May through August. A secondary rice crop can be planted from June to July. The first 1992/93 USDA rice production estimate will be released in July.

The drought damaged the white, mountain-grown corn crop and reduced water availability for the soon-to-be-planted irrigated coastal corn crop. Corn harvested area is expected to decline to 360,000 hectares, down 10 percent from last season. Since corn yield also was affected, production is forecast at 0.55 million tons, down 18 percent from 1991. Corn production has not been as seriously affected as rice because farmers had the option of planting corn in April, thus benefiting from the heavy March rains.

PHILIPPINES: RICE CROP DAMAGED BY DROUGHT

The 1991/92 Philippine rice crop is estimated at 5.9 million tons (milled basis), down 0.4 million from the May estimate due to drought, according to the U.S. agricultural counselor in Manila. The estimated harvested area fell 0.1 million hectares, to 3.3 million. The major drought-affected areas include Western Visayas and most of Mindanao. Rainfall in these areas is estimated to have averaged less than 20 percent of normal since December. Consequently, reservoir levels for irrigation are inadequate. Production in the central Luzon rice area also is expected to be reduced because of diminished supplies of irrigation water. Most of the decline in production is from the second season crop that is planted in January and February and harvested from April through June.

SOUTH AFRICA: WHEAT PLANTING AFFECTED BY DROUGHT

The 1992 summer drought in South Africa is having a negative impact on the 1992/93 wheat crop which is planted from mid-April through July. According to the U.S. agricultural attache in Pretoria, wheat planting is proceeding normally in western Cape province where 40 to 45 percent of the crop is grown, but planting conditions in the summer rainfall regions of the Orange Free State and western Transvaal are poor due to low soil moisture. These 2 provinces normally produce about 55 percent of South Africa's total wheat crop. The drought is expected to reduce 1992/93 harvested area by 33 percent from last season, to 0.95 million hectares, and drop production to an estimated 1.20 million tons, well below the 1991 crop of 2.16 million.

WORLD: SUGAR FORECAST REVISED UPWARD

World sugar production for 1992/93 has been revised to 114.3 million tons (raw value), 0.9 million more than the previous forecast released in May 1992 (WAP 5-92). Production for 1991/92 has been changed from 112.6 to 113.7 million tons. The revisions are due to changes in Chinese sugar output in 1991/92 and 1992/93. According to the U.S. agricultural counselor in Beijing, China is projected to produce 8.5 million tons of sugar in 1992/93, compared to a revised 8.1 million in 1991/92. While area planted to beet and cane expanded significantly in 1991/92, improved yields also contributed to the dramatic increase.

The main reason for the large increase in China's sugar production is economic. Procurement prices for beet and cane currently are better than that for many other annual crops. The 1991/92 area for sugarcane has been changed from 1.05 million hectares to 1.15 million. The new raw material estimate for 1991/92 is 70.0 million tons, up from the May estimate of 58.0 million. Based on this revised estimate, 6.3 million tons of cane sugar (raw value) were obtained rather than the earlier estimate of 5.5 million. The 1992/93 area planted to cane remains unchanged at 1.2 million hectares, but the raw material production estimate has been revised upward, from 61.0 million tons to 72.5 million. The 1992/93 forecast for cane sugar production (raw value) has been increased from 5.6 million tons to 6.5 million. No changes were made in sugarbeet area for either of the 2 years, but the raw material estimate for 1991/92 has been increased from 15.0 million tons, to 16.5 million, and beet sugar output (raw value) has been revised from 1.5 million tons to 1.8 million. The 1992/93 forecast for raw sugar production from sugarbeets remains unchanged at 2.0 million tons.

WORLD COFFEE PRODUCTION

The preliminary forecast of 1992/93 world green coffee production is 94.9 million 60-kilogram bags, down 6 percent from the 100.5 million bag harvest in 1991/92 and 8 percent below the 1987/88 record of 103.3 million bags. Production in all regions is expected to be below the 1991/92 level, except for Oceania, where 1992/93 output is expected to be about 120,000 bags more than last year. The South American region, which accounts for 48 percent of the 1992/93 world forecast, is expected to be down 8 percent or 3.9 million bags.

BRAZIL: The world's largest producer is expected to harvest 24.0 million bags in 1992/93, 16 percent below last season and 39 percent (15.6 million bags) below the 1961/62 record. The Brazilian forecast reflects the biological yield of coffee when surveyed in late April and early May 1992. Two years ago, Brazil's production potential exceeded 40 million bags from a coffee tree population estimated at more than 4.2 billion. Brazil's current production potential is estimated at only 34 to 36 million bags due to the uprooting of approximately 650 million trees, which dropped the total number of bearing trees to less than 3.6 billion. The decline in domestic and world coffee prices since 1989 and the suspension of guarantees by the Government to purchase surplus coffee spurred growers to eradicate trees. If international and domestic prices remain low throughout the 1992/93 season, growers may decide to leave many of their beans unharvested. Increasing costs for inputs necessary to achieve high yields, coupled with the high cost of credit, has further damped prospects for the 1992/93 crop.

Brazil's total area planted to coffee trees is estimated to have decreased from about 3.5 million hectares in 1991/92 to less than 2.5 million in 1992/93. Coffee tree eradication has freed up an estimated 1.1 million hectares of land--land that is now pasture or is planted to sugarcane, citrus, soybeans, wheat, and corn. Nearly all the coffee trees uprooted were old and only marginally productive, having been planted under the obsolete field spacing system of 800 to 900 trees per hectare. Under the new planting system, about 4,000 to 5,000 coffee seedlings are planted per hectare. Inter-cropping between rows of coffee trees is limited to rice, corn, and edible beans and is carried out only during the off-year production cycle or on small plantations.

COLOMBIA: Coffee production for 1992/93 is forecast at a record 16.5 million bags, 4 percent above the revised 1991/92 level of 15.9 million. The projected increase is due to an ongoing program to replace older trees with varieties that are high-yielding and disease-resistant. Currently, about two-thirds of the total coffee area of 1.1 million hectares (4.1 billion trees) has been replanted with high-yielding, disease-resistant varieties. The Colombian Coffee Committee recently approved a plan to reduce the country's coffee area by 100,000 hectares, about 9 percent of the total coffee area. The Committee is responsible for determining Colombia's coffee policy and includes members of the Coffee Growers Federation (FEDECAFE). Reportedly, the lower area will reduce production by 1.5 million bags.

Despite a sharp drop in world coffee prices, production has remained high because growers continue to receive subsidized payments from the National Coffee Fund (FNC). The FNC accumulated its financial reserves during the years when international coffee prices far exceeded current levels. Even though world coffee prices are declining, the domestic coffee support price continues to rise in order to compensate for inflation and increased production costs.

Because of the continuing decline in world prices and the concurrent rise in production costs, independent coffee growers and FEDECAFE have expressed concern about the future of Colombia's coffee sector.

In 1991/92, coffee production costs were estimated at approximately US\$0.86 per pound, whereas world market prices fluctuated between US\$0.60 and US\$0.65 during April and May of 1992. FEDECAFE officials have insisted that area expansion be halted, thereby limiting future production increases that would further drain the FNC coffers.

Although Colombian coffee is marketed throughout the year, there are 2 distinct harvest periods. The main harvest in the departments of Caldas, Risaralda, and Quindio occurs from September through December. The minor harvest in these departments takes place in April and May. The principal harvest period in Colombia's other producing areas occurs in April, May, and June with a secondary harvest from September through December. Coffee production is confined primarily to the slopes of the central and eastern Andean mountain ranges where the soil is derived mainly from volcanic ash--the best type of soil for coffee production. Small family farms, of less than 50 hectares, produce the bulk of Colombia's coffee. Coffee rust and the coffee borer insect are the main disease/pest problems of concern to all Colombian growers.

INDONESIA: Coffee production in 1992/93 is forecast at a record 7.5 million bags, up 2 percent from 1991/92 and slightly above the previous record set in 1990/91. Although dry conditions are expected to reduce 1992/93 yields below the level attained last season, the projected increase in production is predicated upon additional trees entering the bearing stage. The drought is not expected to significantly affect bean quality in 1992/93. Indonesia has slightly more than 1.0 million hectares planted to coffee and a total coffee tree population of approximately 1.5 billion. Coffee is usually inter-planted with food crops or other tree crops such as coconuts, papaya, and cloves, enabling smallholders to maximize returns by diversifying their holdings and spreading the risk.

The coffee sector in Indonesia is comprised mainly of smallholder operations (97 percent) growing the low-quality Robusta variety which has been cleft-grafted onto nematode-resistant stocks. The Robusta crop accounts for about 95 percent of Indonesia's annual coffee output. However, for the past several years, the Government has endeavored to change the Arabica/Robusta mix to a 30:70 percentage share. Because of the wide geographic distribution of the archipelago, coffee is harvested year-round. However, approximately 60 percent of the coffee crop is harvested from June through September. Harvesting usually commences in March, peaks during the June-August period, then begins to taper off in September. Sumatra is the most important coffee producing island; one-third of the national harvest is grown in South Sumatra and Lampung provinces. The Government's coffee production policy remains focused on the rehabilitation and intensification of existing areas via increased yields and improvements in bean quality.

MEXICO: The total area planted to coffee in 1992/93 is expected to remain unchanged at 600,000 hectares holding a total tree population of 810.0 million. However, coffee production in 1992/93 is forecast at 4.2 million bags, 5 percent less than last season and 24 percent below the record 1988/89 crop. The downturn reflects an expected decline in yields caused by poor tree care, a high incidence of pest and disease problems, and heavy rains early in 1992 that caused partial losses and slowed harvesting in Veracruz, Guerrero, and Nayarit.

Coffee growers in Puebla normally enjoy the highest yields in Mexico. However, low world prices forced many growers in Puebla to cut back on necessary cultural practices in order to reduce production costs. As a result, phytosanitary problems were reported on 330,000 hectares--225,000 hectares infested with coffee rust and 105,000 hectares damaged by the coffee borer insect. Although international coffee prices are expected to recover slightly during the 1992/93 season due to lower world supplies, many growers will not be able to sustain production at profitable levels because of high input costs.

COTE D'IVOIRE: Coffee production in 1992/93 is forecast at 4.0 million bags, up 12 percent from the 1991/92 estimate, but 34 percent less than the record crop of 6.1 million harvested in 1980/81. The increase projected for the upcoming season is due to improved rainfall and the return to production of previously non-productive, heavily pruned trees. The reintroduction of an advanced de-hulling technique has helped improve crop quality. Area expansion and replanting efforts have been hindered by the financial problems facing the industry. Farmer income, already diminished by low world market prices, has been reduced further by delayed purchasing resulting in increased storage costs. The total area planted to coffee trees at the beginning of the 1992/93 season is estimated at approximately 1.4 million hectares (1.8 billion trees), virtually unchanged from last season. The Government's long-range objective is to replace old coffee trees with trees provided by the government extension agency, but progress has been slow.

GUATEMALA: Coffee production for 1992/93 is forecast at 3.0 million bags, down 13 percent from 1991/92. Area under coffee cultivation for the 1992/93 season is expected to remain stable at approximately 270,000 hectares (700.0 million trees). Although early-season rainfall has been good resulting in excellent flowering, output is expected to drop because of lower yields. Compared to other coffee producing countries, yields in Guatemala are low. However, high production costs are responsible for the poor yield potential of this year's crop. Currently, the most expensive production inputs are imported fertilizers, pesticides, machinery and spare parts, and labor. The increase in production costs, coupled with low world coffee prices, has forced growers to cut back on normal cultural practices, particularly fertilizer applications. The National Coffee Association (ANACAFE), which has ongoing programs to assist producers in the areas of soil and shade management, recently published an article titled "Emergency Agriculture Alternatives" that tells growers how to minimize production costs while maintaining coffee output. Unfortunately, this information is of little use to those growers unable to secure credit to finance their coffee operations. Coffee industry representatives from various Central American countries have been meeting with the Central American Parliament over the past several months to discuss the possibility of setting up a credit program for the region's coffee sectors. Currently, it appears unlikely that such a loan scheme will ever become a reality.

INDIA: The forecast for the 1992/93 coffee crop is 2.5 million bags (1.2 million of Arabica and 1.3 million of Robusta), down 21 percent from last season and 30 percent less than the record 3.6 million bag harvest in 1988/89. A normal cyclical downturn and dry weather between January and April 1992 in the 3 southern coffee producing states of Karnataka, Kerala, and Tamil Nadu are the main reasons for the projected decline. The drought significantly reduced blossom formation, healthy blossoms withered, and berries were scorched. Reportedly, flush growth and spike maturation were also unsatisfactory.

Although India has ample supplies of fertilizer, low coffee prices since mid-1989 and higher prices for both fertilizer and the copper sulfate used to control pests have reduced input usage by small growers. In contrast, large estate holders, who account for 60 percent of total production, have continued to apply the recommended amounts. India has approximately 430.0 million coffee trees planted on 250,000 hectares. No further expansion of coffee area is forecast.

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TABLE 9
GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES
(1,000 60-Kg Bags) 1/

Region and Country	1989/90	1990/91	1991/92	1992/93 2/
NORTH AMERICA				
Costa Rica	2,453	2,565	2,530	2,500
Cuba	475	480	450	450
Dominican Republic	756	672	702	720
El Salvador	2,787	2,603	2,500	2,400
Guatemala	3,472	3,282	3,443	3,000
Haiti	527	580	550	500
Honduras	1,928	1,685	1,950	1,600
Jamaica & Dep	19	26	25	25
Mexico	5,100	4,550	4,400	4,200
Nicaragua	743	454	780	660
Panama	182	200	200	200
Trinidad and Tobago	15	15	15	15
United States 3/	234	232	235	235
TOTAL	18,691	17,344	17,780	16,505
SOUTH AMERICA				
Bolivia	258	342	350	350
Brazil	26,000	31,000	28,500	24,000
Colombia	13,300	14,500	15,900	16,500
Ecuador	2,150	1,830	1,800	1,780
Guyana	5	5	5	5
Paraguay	430	340	400	400
Peru	1,400	1,150	1,000	900
Venezuela	1,075	843	1,112	1,200
TOTAL	44,618	50,010	49,067	45,135
AFRICA				
Angola	170	170	170	170
Benin	35	35	35	35
Burundi	616	517	550	500
Cameroon	1,440	1,450	1,420	1,350
Central African Rep.	300	350	350	350
Congo	25	25	25	25
Cote d'Ivoire	4,734	4,000	3,583	4,000
Equatorial Guinea	15	15	15	15
Ethiopia	3,400	3,500	3,000	3,000
Gabon	30	30	30	30
Ghana	17	35	35	35
Guinea	125	125	125	125
Kenya	1,740	1,503	1,650	1,600
Liberia	40	30	30	30
Madagascar	1,100	1,100	1,150	1,100
Malawi	95	90	90	70
Nigeria	95	90	90	90
Rwanda	561	619	660	650
Sierra Leone	100	100	100	100
Tanzania	888	763	770	800
Togo	300	300	300	300
Uganda	2,500	2,700	3,000	3,000
Zaire	2,000	1,695	1,500	1,300
Zambia	15	15	15	15
Zimbabwe	225	225	225	200
TOTAL	20,566	19,482	18,918	18,890
ASIA				
India	2,150	2,970	3,170	2,500
Indonesia	7,100	7,480	7,350	7,500
Malaysia	75	75	75	75
Philippines	1,149	970	950	900
Sri Lanka	70	75	75	75
Thailand	800	785	930	900
Vietnam	985	1,200	1,350	1,400
Yemen	65	65	65	65
TOTAL	12,394	13,620	13,965	13,415
OCEANIA				
New Caledonia	5	5	5	5
Papua New Guinea	1,092	964	781	900
TOTAL	1,097	969	786	905
WORLD TOTAL	97,366	101,425	100,516	94,850

1/ One bag = 132.276 pounds.

2/ Coffee marketing year begins October in some countries and April or July in others.

3/ Includes Puerto Rico and Hawaii.

NOTE: Production estimates for some countries include cross-border movements.

World unmanufactured tobacco production for 1992 is forecast at 7.8 million tons (farm sales weight basis), up 5 percent from the revised 1991 production level of 7.4 million tons. Production of flue-cured tobacco, which accounts for approximately 60 percent of the world total, is forecast at nearly 4.8 million tons, up 5 percent from 1991, mainly due to a large upward revision in Chinese production. Favorable weather and increased plantings in Brazil are expected to increase production above earlier projections. High producer prices in India, Pakistan, Malawi, Zimbabwe, Thailand, Turkey, Bulgaria, and Romania are expected to boost 1992 production in these countries. Large increases forecast in December for Mexico and Argentina did not materialize because of inclement weather. Production declines are expected in Greece because of drought and in Italy because of EC-12 production controls.

NORTH AMERICA: Total unmanufactured tobacco production in North America for 1992 is projected at 865,640 tons, down slightly from revised 1991 production totals. Production in the United States is forecast at 756,345 tons, only a small increase from 1991 mainly because of a 3-percent drop in projected flue-cured yields. Mexican production for 1992 is forecast at 33,730 tons, down 12 percent from the revised 1991 estimate and only one-half the level projected last December. The decline is due to unfavorable weather in Nayarit, Mexico's major tobacco producing area, which more than offset the gains anticipated from an 82-percent increase in area. Tobacco production in Canada is estimated at 75,565 tons, up 1 percent from 1991 and 11 percent greater than the December forecast. The 1992 forecast was revised upward because of an increase in plantings generated by better-than-expected support prices.

SOUTH AMERICA: Brazil's 1992 tobacco crop is estimated at a record 523,000 tons, 24 percent larger than last year's weather-damaged crop and 4 percent greater than the December projection. Both yields and planted area are up 11 percent. Plantings rose mainly because farmers replaced less profitable food crops with tobacco. The 1992 Argentine crop is estimated at 109,930 tons, up 16 percent from 1991, but 16 percent below the December forecast because inclement weather in Salta, Jujuy, and Tucuman provinces is expected to reduce the flue-cured crop by 20,000 tons.

EC-12: Total tobacco production for 1992 is forecast at 419,299 tons, down 9 percent from 1991. Italy's 1992 crop is projected at 170,000 tons, down 15 percent from last year largely due to new EC-12 production controls. In Greece, drought is expected to reduce tobacco production by 9 percent, to 155,000 tons. Tobacco production in Spain is forecast at 47,730 tons, up 3 percent from 1991, but 13 percent below the December forecast because of lower-than-anticipated yields. French tobacco production for 1992 is forecast at 28,221 tons, down 4 percent from 1991 primarily because 1992 yields are expected to be much lower than the exceptionally high levels attained last year.

EASTERN EUROPE: Tobacco production in Yugoslavia is forecast at 55,833 tons, down 10 percent from 1991 because of lower yield projections. In Bulgaria, tobacco is expected to increase from 73,897 tons to 90,400. The upturn is due to a 26-percent increase in area because 1992 support prices were fixed prior to the planting season. The 1992 tobacco crop in Romania is forecast at 24,000 tons, up 73 percent from 1991 because of substantially higher grower prices.

SUB-SAHARAN AFRICA: Tobacco production for 1992 in the Republic of South Africa is estimated at 33,600 tons, up 10 percent from 1991 because of increased plantings and yields. Production is currently below authorized quota levels because of water shortages and quality problems caused by minerals in the irrigation water. Tobacco production in Zimbabwe is forecast at a record 195,250 tons, up 10 percent from 1991, but 3 percent below the December projection because of drought. To date, the drought in southern Africa has not seriously damaged Zimbabwe's 1992 crop. However, if the drought continues, planting levels for 1993 could be seriously jeopardized. In Malawi, 1992 production is estimated at 126,900 tons, slightly greater than the 1991 crop, but 3,400 tons below the December forecast because of dry weather in early 1992.

ASIA: Chinese tobacco production for 1992 is expected to total a record 3.1 million tons, a 4-percent increase over 1991. Growth may slow during 1992 as growers focus on improving leaf quality. The Central Government has tried to encourage farmers to plant more grain, but local officials favor tobacco because it is a major source of tax revenue. India's 1992 tobacco crop is estimated at 538,500 tons, up 14 percent from 1991 and 3 percent above the December forecast. The increase reflects a 36-percent rise in the flue-cured quota, authorized because of the high prices paid to growers for the 1991 flue-cured crop. Current crop prices for flue-cured tobacco are about 10 percent less than last year, but the growers' response to 1991 prices is expected to result in a 40-percent increase in 1992 flue-cured production, to 153,000 tons. Tobacco production in Japan for 1992 is estimated at 73,300 tons, up 5 percent from last year's typhoon-damaged crop, but slightly below the December forecast. Thailand's 1992 tobacco crop is expected to reach 95,800 tons, up 26 percent from last year. The upturn is due to increased plantings resulting from favorable producer returns in 1991 and higher yields because of excellent growing conditions. The 1992 tobacco crop in the Philippines is estimated at 84,838 tons, up 2 percent from 1991 and 1 percent greater than the December forecast despite the October 1991 typhoon that washed-out some of the tobacco seed beds. Tobacco production in Pakistan is forecast at 94,000 tons, up 16 percent from last year because of a 13-percent increase in area, better yields, and higher farmgate prices. Indonesia's tobacco output for 1992 is projected at 144,140 tons, down 16 percent from the revised 1991 crop of 170,850 due to reduced purchases by cigarette manufacturers. During 1991, demand for cigarettes fell when changes in Government policies on taxes and packaging requirements precipitated a 30-percent increase in retail prices.

MIDDLE EAST: Turkey's 1992 tobacco crop is estimated at 281,619 tons, up 24 percent from 1991 and 27 percent higher than the December forecast because of a 9-percent increase in planted area and higher yields. Plantings were expanded in response to favorable 1991 farmgate prices.

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TABLE 10

TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA				PRODUCTION			
	1990	1991	1992	1/	1990	1991	1992	1/
	Hectares				Metric tons			
NORTH AMERICA								
Canada	29,346	30,325	30,775	63,057	74,690	75,565		
Mexico	22,118	18,666	33,930	34,653	38,250	33,730		
United States	296,887	309,214	311,801	737,722	754,534	756,345		
Total	348,351	358,205	376,506	835,432	867,474	865,640		
SOUTH AMERICA								
Argentina	50,155	64,610	77,575	67,588	94,443	109,930		
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250		
Brazil	282,000	288,000	320,000	435,000	422,000	523,000		
Chile	3,909	4,349	5,239	12,785	14,076	17,205		
Colombia	20,557	19,679	19,638	32,060	30,527	30,230		
Ecuador	1,800	1,800	1,800	3,850	3,850	3,850		
Paraguay	2,865	3,615	5,165	6,071	7,755	11,055		
Peru	2,500	2,500	2,500	3,100	3,100	3,100		
Uruguay	800	800	800	1,400	1,400	1,400		
Venezuela	8,012	9,071	9,908	13,597	12,048	14,800		
Total	373,848	395,674	443,875	576,701	590,449	715,820		
CENTRAL AMERICA								
Costa Rica	854	760	988	1,728	1,305	1,940		
El Salvador	543	561	561	970	1,038	1,038		
Guatemala	6,244	5,914	8,129	10,568	10,161	15,168		
Honduras	2,640	2,856	3,712	4,605	4,590	6,782		
Nicaragua	2,240	2,240	2,240	4,550	4,550	4,550		
Panama	720	720	720	1,302	1,302	1,302		
Total	13,241	13,051	16,350	23,723	22,946	30,780		
CARIBBEAN								
Cuba	50,000	50,000	50,000	44,000	44,000	44,000		
Dominican Republic	14,830	18,450	18,450	15,085	25,312	25,312		
Jamaica	1,175	1,175	1,175	2,339	2,339	2,339		
Total	66,005	69,625	69,625	61,424	71,651	71,651		
EC-12								
Belgium-Lux	461	468	468	1,553	450	1,800		
France	10,704	10,537	10,738	28,284	29,499	28,221		
Germany	5,880	5,001	5,000	11,147	10,500	10,500		
Greece	76,459	82,984	85,200	134,368	170,150	155,000		
Italy	87,719	81,500	69,300	214,846	200,000	170,000		
Portugal	2,257	2,450	2,450	5,573	6,048	6,048		
Spain	23,450	24,420	25,295	43,500	46,173	47,730		
Total	206,930	207,360	198,451	439,271	462,820	419,299		
EASTERN EUROPE								
Albania	24,000	24,000	24,000	15,000	15,000	15,000		
Bulgaria	52,891	59,951	67,600	66,858	73,897	90,400		
Czechoslovakia	3,750	3,193	2,800	5,000	5,415	4,949		
Hungary	8,690	9,760	9,500	14,346	18,610	18,135		
Poland	25,754	28,720	29,430	50,000	54,780	56,000		
Romania	16,845	9,860	20,000	14,200	13,900	24,000		
Yugoslavia	45,000	45,000	46,000	46,620	62,160	55,833		
Total	176,930	180,484	199,330	212,024	243,762	264,317		
FSU-12 2/	103,820	105,120	107,600	250,000	257,000	257,000		

FOOTNOTES AT END OF TABLE

JUNE 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION			
	1990	1991	1992	1/	1990	1991	1992
	----Hectares----			---Metric tons---			
NORTH AFRICA							
Algeria	2,900	2,900	2,700	4,390	5,000	5,000	
Libya	900	900	900	1,450	1,450	1,450	
Morocco	5,788	4,927	5,500	7,171	5,995	6,369	
Tunisia	5,500	6,000	6,000	6,215	6,300	6,300	
Total	15,088	14,727	15,100	19,226	18,745	19,119	
SUB-SAHARAN AFRICA							
Angola	3,950	3,950	3,950	3,900	3,900	3,900	
Burundi	2000	2000	2000	1600	1600	1600	
Cameroon	3400	3400	3400	5500	5500	5500	
Central Africa Rep.	750	750	750	650	650	650	
Congo	4,000	4,000	4,000	1,800	1,800	1,800	
Cote D' Ivorie	10000	10000	10000	2490	2490	2490	
Ethiopia	3000	3000	3000	3500	3500	3500	
Ghana	3950	3950	3950	1839	2080	2080	
Kenya	8,805	8,805	8,805	9,910	9,910	9,910	
Madagascar	5,900	5,900	5,900	5,500	5,500	5,500	
Malawi	100,110	117,100	128,000	101,652	125,390	126,900	
Mozambique	2,700	2,700	2,700	2,900	2,900	2,900	
Niger	1,000	1,000	1,000	930	930	930	
Nigeria	7,300	7,300	7,300	9,223	9,223	9,223	
Reunion	200	200	200	200	200	200	
South Africa	25,454	23,427	24,500	27,485	30,600	33,600	
Swaziland	200	200	200	200	200	200	
Tanzania	21,250	21,250	21,250	14,055	14,055	14,055	
Togo	4,000	4,000	4,000	2,000	2,000	2,000	
Uganda	4,300	4,300	4,300	4,000	4,000	4,000	
Zaire	3,700	3,700	3,700	4,110	4,110	4,110	
Zambia	3,500	3,500	3,500	4,300	4,300	4,300	
Zimbabwe	62,924	71,647	88,390	139,803	178,107	195,250	
Total	282,393	306,079	334,795	347,547	412,945	434,598	
ASIA							
Bangladesh	40,500	40,500	40,500	40,000	40,000	40,000	
Burma	55,000	55,000	55,000	45,000	45,000	45,000	
Cambodia	9,000	9,000	9,000	5,000	5,000	5,000	
China	1,592,600	1,660,000	1,680,000	2,627,500	2,940,000	3,056,700	
India	421,100	392,192	443,200	564,400	472,000	538,500	
Indonesia	241,170	240,568	203,140	158,865	170,850	144,140	
Japan	29,964	28,924	27,300	80,542	69,897	73,300	
Korea, North	37,000	37,000	37,000	46,000	46,000	46,000	
Korea, South	31,339	30,671	28,500	66,213	69,696	66,133	
Laos	4,000	4,000	4,000	3,000	3,000	3,000	
Malaysia	10,488	15,400	15,400	10,997	11,000	11,000	
Pakistan	40,911	48,395	54,626	68,040	80,806	94,000	
Philippines	49,830	52,831	57,438	70,130	82,872	84,838	
Sri Lanka	12,165	12,165	12,165	9,000	9,000	9,000	
Taiwan	7,941	7,895	7,850	19,129	21,401	18,500	
Thailand	63,095	62,220	73,500	75,630	75,928	95,800	
Vietnam	32,000	32,000	32,000	28,000	28,000	28,000	
Total	2,678,103	2,728,761	2,780,619	3,917,446	4,170,450	4,358,911	
MIDDLE EAST							
Iran	18,000	18,000	18,000	25,000	25,000	25,000	
Iraq	2,000	2,000	2,000	2,180	2,180	2,180	
Jordan	2,953	2,953	2,953	2,800	2,800	2,800	
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000	
Oman	1,800	1,800	1,800	2,000	2,000	2,000	
Syria	12,757	14,441	15,260	13,007	15,995	16,287	
Turkey	319,937	276,974	300,840	295,599	227,257	281,619	
United Arab Em.	350	350	350	2,000	2,000	2,000	
Yemen	3,300	3,300	3,300	5,720	5,720	5,720	
Total	364,847	323,568	348,253	353,306	287,952	342,606	
OCEANIA							
Australia	4,727	4,932	4,900	13,327	13,420	13,500	
New Zealand	600	600	600	1,550	1,550	1,550	
Total	5,327	5,532	5,500	14,877	14,970	15,050	
OTHER 3/	5,803	5,545	5,520	5,920	5,802	5,750	
WORLD	4,640,686	4,713,731	4,901,524	7,056,897	7,426,966	7,800,541	

1/ Forecast.

2/ FSU-12 includes the 12 newly independent states of the former USSR.

3/ Includes Guyana, Haiti, Trinidad & Tobago, Benin, Mauritius, Mali, Sierra Leone, St. Vincent, Cyprus, Solomon Islands, Israel, Switzerland, Austria, Chad, and Liberia.

WORLD UNMANUFACTURED TOBACCO PRODUCTION BY TYPE

World unmanufactured tobacco production for 1992 is estimated at 7.8 million tons (farm sales weight basis), up 5 percent from 1991. Estimated production by leaf type is as follows:

<u>Leaf Type</u>	Revised 1990	Revised 1991	Preliminary 1992
-----1,000 Metric tons-----			
Flue-cured	4,002	4,524	4,766
Burley	730	815	889
Oriental	814	784	855
Dark air/sun-cured	1,176	944	933
Light air-cured	71	81	88
Dark air-cured, cigar	205	214	208
Dark fire-cured	58	66	61
 Total <u>1/</u>	 7,057	 7,427	 7,801

1/ Individual types may not add to total due to rounding.

FLUE-CURED: World production is estimated at 4.8 million tons, up 5 percent from 1991 mainly because of an upward revision in Chinese production. Favorable weather and increased plantings are expected to boost production in Brazil and India. In Zimbabwe, production is expected to increase by only 9 percent despite a 23-percent increase in plantings because of a drought-induced reduction in estimated 1992 yields. In Canada, production is expected to rise, to 75,000 tons, in response to favorable grower prices in 1991. Preliminary assessments indicate 1992 flue-cured production in the United States will decrease by 2 percent, to 406,247 tons, because of reduced yields. In Indonesia, lower farmgate prices reportedly are responsible for the decline in 1992 plantings and production. Drought is expected to reduce 1992 Greek production of flue-cured tobacco by 18 percent, to 36,000 tons. In Italy, production is expected to drop to 50,000 tons because the EC-12 has announced it will enforce tobacco production quotas.

BURLEY: World production for 1992 is projected up 9 percent from last year, to 888,926 tons. Estimates for the major producers indicate burley production will increase in the United States, Malawi, and Brazil, but decline in Italy.

ORIENTAL: World production is forecast at 855,142 tons, 9 percent above 1991. In Turkey, the largest producer of oriental tobacco, 1992 production is expected to increase by 24 percent, to 280,000 tons, because the high prices paid for the 1991 crop encouraged increased plantings. In Bulgaria, production is forecast at 75,000 tons, up 27 percent from 1991 due to favorable grower prices. Production in Greece is forecast to fall 5 percent, to 110,000 tons, because of drought.

DARK AIR/SUN-CURED: World production for 1992 is estimated at 932,950 tons, down 1 percent from last year. India, the world's leading producer of dark air/sun-cured tobacco, is expected to harvest a 357,000 ton crop, up 3 percent from last year because 1991 grower prices were favorable. Chinese production is forecast at 110,000 tons, up 10 percent from 1991. Italy's 1992 crop is forecast at 35,000 tons, down from 55,000 last year due to the EC-12's intention to enforce the quota system. Unfavorable grower prices are expected to cut Indonesian production to 75,000 tons, down 19 percent from 1991. Lower yields are expected to reduce Brazil's 1992 production by 6 percent, to 67,000 tons. Dark air/sun-cured tobacco is grown in northeast Brazil where the weather has been less favorable than in 1991.

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TABLE 11

FLUE-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA				PRODUCTION		
	1990	1991	1992	1/	1990	1991	1992
	----Hectares----				---Metric tons---		
NORTH AMERICA							
Canada	28,948	30,000	30,500	62,150	74,000	75,000	
Mexico	7,160	3,590	7,290	11,380	8,290	11,600	
United States	168,785	162,996	164,818	426,034	413,625	406,247	
Total	204,893	196,586	202,608	499,564	495,915	492,847	
SOUTH AMERICA							
Argentina	29,500	32,480	40,000	43,645	58,520	55,000	
Brazil	157,000	165,000	193,000	295,000	278,000	364,000	
Chile	1,186	1,335	1,593	3,521	3,964	4,627	
Colombia	2,791	2,170	1,870	5,203	3,916	3,230	
Ecuador	650	650	650	1,575	1,575	1,575	
Peru	1,200	1,200	1,200	1,820	1,820	1,820	
Uruguay	665	665	665	1,250	1,250	1,250	
Venezuela	5,097	5,834	6,058	8,512	7,408	8,800	
Total	198,089	209,334	245,036	360,526	356,453	440,302	
CENTRAL AMERICA							
Costa Rica	232	252	301	539	469	626	
El Salvador	377	366	366	621	670	670	
Guatemala	763	598	863	1,419	1,103	1,576	
Honduras	694	909	872	1,366	1,446	1,715	
Nicaragua	500	500	500	1,000	1,000	1,000	
Panama	100	100	100	180	180	180	
Total	2,666	2,725	3,002	5,125	4,868	5,767	
CARIBBEAN							
Dominican Republic	1,590	1,660	1,660	3,176	3,312	3,312	
Jamaica	547	547	547	1,212	1,212	1,212	
Total	2,137	2,207	2,207	4,388	4,524	4,524	
EC-12							
France	2,602	2,678	3,100	5,136	5,828	6,405	
Germany	1,707	2,300	2,300	2,397	3,900	3,900	
Greece	7,600	16,008	17,000	29,600	43,900	36,000	
Italy	25,161	25,000	23,000	54,023	54,000	50,000	
Portugal	1,838	2,000	2,000	4,350	4,733	4,733	
Spain	13,700	16,300	16,600	27,000	32,500	33,000	
Total	52,608	64,286	64,000	122,506	144,861	134,038	
EASTERN EUROPE							
Bulgaria	7,200	7,841	7,500	10,200	11,512	12,000	
Czechoslovakia	3,000	2,286	2,000	4,000	4,000	3,709	
Hungary	5,150	5,800	5,800	8,484	9,660	9,700	
Poland	11,206	13,000	13,710	20,170	23,000	24,220	
Romania	3,370	2,750	4,400	2,680	3,475	4,600	
Yugoslavia	16,000	11,000	12,000	17,760	17,760	16,650	
Total	45,926	42,677	45,410	63,294	69,407	70,879	

FOOTNOTES AT END OF TABLE

JUNE 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 11 (Continued)

FLUE-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA				PRODUCTION			
	1990	1991	1992	1/	1990	1991	1992	1/
	----Hectares----				---Metric tons---			
SUB-SAHARAN AFRICA								
Angola	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200
Ethiopia	1,500	1,500	1,500	1,750	1,750	1,750	1,750	1,750
Ghana	3,160	3,230	3,230	1,464	1,700	1,700	1,700	1,700
Kenya	5,500	5,500	5,500	5,920	5,920	5,920	5,920	5,920
Madagascar	750	750	750	1,200	1,200	1,200	1,200	1,200
Malawi	16,600	17,500	18,500	21,818	25,747	25,500		
Mozambique	1,270	1,270	1,270	1,350	1,350	1,350	1,350	1,350
Nigeria	1,100	1,100	1,100	1,752	1,752	1,752	1,752	1,752
South Africa	21,126	19,510	20,500	23,368	27,283	29,545		
Tanzania	18,218	18,218	18,218	11,000	11,000	11,000	11,000	11,000
Uganda	2,150	2,150	2,150	2,000	2,000	2,000	2,000	2,000
Zaire	880	880	880	1,400	1,400	1,400	1,400	1,400
Zambia	2,850	2,850	2,850	3,500	3,500	3,500	3,500	3,500
Zimbabwe	59,425	66,927	82,500	133,866	170,150	185,000		
Total	137,729	144,585	162,148	213,588	257,952	274,817		
ASIA								
Bangladesh	14,175	12,000	12,000	14,000	13,000	13,000		
Burma	5,800	5,800	5,800	13,200	13,200	13,200	13,200	13,200
Cambodia	2,600	2,600	2,600	1,200	1,200	1,200	1,200	1,200
China	1,342,000	1,453,000	1,461,000	2,259,000	2,698,000	2,800,000		
India	88,600	103,342	140,000	100,840	109,500	153,000		
Indonesia	75,500	79,000	70,000	49,980	52,450	47,350		
Japan	19,660	19,213	18,000	50,540	43,599	46,200		
Korea North	15,100	15,100	15,100	18,400	18,400	18,400	18,400	
Korea, South	22,595	21,390	19,300	46,037	47,180	43,333		
Laos	1,150	1,150	1,150	1,025	1,025	1,025	1,025	
Malaysia	10,168	15,000	15,000	10,517	10,400	10,400	10,400	
Pakistan	11,516	14,157	18,433	24,988	31,032	40,000		
Philippines	29,300	29,600	32,600	41,610	45,175	47,200		
Sri Lanka	6,117	6,117	6,117	4,909	4,909	4,909	4,909	
Taiwan	7,941	7,895	7,850	19,129	21,401	18,500		
Thailand	24,775	26,400	31,200	32,500	34,000	40,000		
Vietnam	12,000	12,000	12,000	9,800	9,800	9,800	9,800	
Total	1,688,997	1,823,764	1,868,150	2,697,675	3,154,271	3,307,517		
MIDDLE EAST								
Iran	2,750	2,750	2,750	5,300	5,300	5,300		
Jordan	2,953	2,953	2,953	2,800	2,800	2,800	2,800	
Syria	1,158	1,202	1,450	2,828	2,823	2,900		
Turkey	681	750	750	1,435	1,500	1,500		
Yemen	3,300	3,300	3,300	5,720	5,720	5,720		
Total	10,842	10,955	11,203	18,083	18,143	18,220		
OCEANIA								
Australia	4,727	4,932	4,900	13,327	13,420	13,500		
New Zealand	583	583	583	1,520	1,520	1,520		
Total	5,310	5,515	5,483	14,847	14,940	15,020		
OTHER 2/	3,030	3,023	3,033	2,496	2,490	2,513		
WORLD	2,352,227	2,505,657	2,612,280	4,002,092	4,523,824	4,766,444		

1/ Forecast.

2/ Includes Guyana, Haiti, Trinidad & Tobago, Benin, Mauritius, Reunion, Mali, Sierra Leone, Cyprus and Morocco.

TABLE 12

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA				PRODUCTION			
	1990	1991	1992	1/	1990	1991	1992	1/
	----Hectares----			---Metric tons---				
NORTH AMERICA								
Mexico	10,917	10,816	22,460	18,013	23,060	23,060	17,290	
United States	109,798	126,316	127,854	271,218	298,546	309,410		
Total	120,715	137,132	150,314	289,231	321,606	326,700		
SOUTH AMERICA								
Argentina	13,200	23,010	28,000	17,450	28,830	44,500		
Brazil	35,000	34,000	38,000	57,000	53,000	68,000		
Chile	2,531	2,849	3,372	8,639	9,632	11,660		
Colombia	2,521	3,165	2,974	3,870	4,905	4,588		
Ecuador	700	700	700	1,700	1,700	1,700		
Paraguay	65	65	65	50	50	55		
Peru	400	400	400	380	380	380		
Uruguay	65	65	65	50	50	50		
Venezuela	2,915	3,237	3,850	5,085	4,640	6,000		
Total	57,397	67,491	77,426	94,224	103,187	136,933		
CENTRAL AMERICA								
Costa Rica	133	119	176	236	186	329		
El Salvador	166	195	195	349	368	368		
Guatemala	5,191	5,039	6,987	8,824	8,655	13,249		
Honduras	1,217	1,150	2,130	1,572	1,458	3,410		
Nicaragua	1,150	1,150	1,150	2,300	2,300	2,300		
Panama	380	380	380	1,000	1,000	1,000		
Total	8,237	8,033	11,018	14,281	13,967	20,656		
CARIBBEAN								
Dominican Republic	1,075	1,090	1,090	2,091	2,400	2,400		
EC-12								
France	1,395	1,521	2,100	3,779	4,184	5,645		
Germany	2,614	1,151	1,150	5,230	2,650	2,650		
Greece	1,800	2,976	3,200	4,268	10,250	9,000		
Italy	16,299	17,500	16,000	54,898	59,100	54,000		
Portugal	419	450	450	1,223	1,315	1,315		
Spain	9,200	7,700	8,300	15,600	13,000	14,100		
Total	31,727	31,298	31,200	84,998	90,499	86,710		
OTHER W. EUROPE								
Switzerland	671	633	628	1,265	1,365	1,320		
EASTERN EUROPE								
Bulgaria	3,400	2,110	2,100	4,200	3,400	3,400		
Czechoslovakia	750	907	800	1,000	1,415	1,240		
Hungary	120	150	150	200	220	235		
Poland	2,984	3,400	3,400	4,030	4,590	4,590		
Romania	4,200	1,950	3,600	4,175	2,780	3,900		
Yugoslavia	2,000	4,000	2,000	3,330	6,660	3,330		
Total	13,454	12,517	12,050	16,935	19,065	16,695		

FOOTNOTES AT END OF TABLE

JUNE 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 12 (Continued)

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION		
	1990	1991	1992	1/	1990	1991
	----Hectares----			---Metric tons---		
NORTH AFRICA						
Libya	360	360	360		859	859
Morocco	5,640	4,813	5,400		6,667	5,580
Tunisia	5,500	6,000	6,000		6,215	6,300
Total	11,500	11,173	11,760		13,741	12,739
SUB-SAHARAN AFRICA						
Angola	250	250	250		200	200
Kenya	250	250	250		278	278
Madagascar	2,150	2,150	2,150		1,545	1,545
Malawi	53,000	60,000	75,000		64,019	75,013
Mozambique	950	950	950		1,150	1,150
South Africa	109	126	125		107	67
Swaziland	100	100	100		100	100
Tanzania	200	200	200		55	55
Zaire	650	650	650		660	660
Zambia	650	650	650		800	800
Zimbabwe	3,267	4,375	5,600		5,893	7,893
Total	61,576	69,701	85,925		74,807	87,761
ASIA						
Bangladesh	0	350	350		280	280
China	25,000	30,000	35,000		40,000	50,000
India	8,300	12,200	15,100		8,200	12,000
Indonesia	40	68	140		50	80
Japan	8,560	8,248	8,000		25,785	22,921
Korea, North	8,744	9,281	9,200		20,176	22,516
Malaysia	320	400	400		480	600
Pakistan	322	313	526		600	610
Philippines	8,500	9,200	10,800		17,260	22,665
Sri Lanka	843	843	843		1,347	1,347
Thailand	8,200	9,420	13,500		20,500	24,300
Total	68,829	80,323	93,859		134,398	157,319
MIDDLE EAST						
Syria	1,471	1,767	1,900		3,492	4,041
Turkey	54	60	60		119	100
Total	1,525	1,827	1,960		3,611	4,141
OCEANIA						
New Zealand	17	17	17		30	30
OTHER 2/	636	726	706		868	810
WORLD	377,359	421,961	477,953		730,480	814,889
						888,926

1/ Forecast.

2/ Includes Haiti, Austria, and Ghana.

TABLE 13
ORIENTAL TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION		
	1990	1991	1992 1/	1990	1991	1992 1/
	----Hectares----			---Metric tons---		
NORTH AMERICA						
Mexico	310	130	150	210	140	40
SOUTH AMERICA						
Chile	90	84	115	148	123	205
CENTRAL AMERICA						
Guatemala	76	76	76	81	84	84
Honduras	33	27	35	27	15	32
Panama	40	40	40	9	9	9
Total	149	143	151	117	108	125
EC-12						
Greece	67,059	64,000	65,000	100,500	116,000	110,000
Italy	10,870	11,000	10,500	19,021	19,500	19,000
Total	77,929	75,000	75,500	119,521	135,500	129,000
EASTERN EUROPE						
Bulgaria	42,291	50,000	58,000	52,458	58,985	75,000
Romania	5,040	1,930	4,000	4,185	2,800	4,500
Yugoslavia	27,000	30,000	32,000	25,530	37,740	35,853
Total	74,331	81,930	94,000	82,173	99,525	115,353
FSU-12 2/	103,820	105,120	107,600	250,000	257,000	257,000
NORTH AFRICA						
Libya	240	240	240	58	58	58
SUB-SAHARAN AFRICA						
Ethiopia	1,500	1,500	1,500	1,750	1,750	1,750
Malawi	450	1,100	1,500	180	530	600
South Africa	916	880	900	503	475	535
Zimbabwe	232	345	290	44	64	50
Total	3,098	3,825	4,190	2,477	2,819	2,935
ASIA						
China	5,000	6,000	7,000	6,500	7,000	7,700
Pakistan	10,493	10,250	11,667	18,360	18,002	21,000
Philippines	30	31	38	30	32	38
Thailand	13,760	10,600	13,800	14,450	9,728	13,000
Total	29,283	26,881	32,505	39,340	34,762	41,738
MIDDLE EAST						
Iran	10,470	10,470	10,470	12,500	12,500	12,500
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Israel	200	0	0	120	0	0
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	9,883	10,995	11,460	6,430	8,548	8,997
Turkey	319,170	276,134	300,000	294,026	225,638	280,000
Total	345,473	303,349	327,680	320,256	253,866	308,677
OTHER 3/	17	17	17	11	11	11
WORLD	634,740	596,719	642,148	814,311	783,912	855,142

1/ Forecast.

2/ FSU-12 includes the 12 newly independent states of the former USSR.

3/ Includes Cyprus.

TABLE 14
DARK AIR/SUN-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION				
	1990	1991	1992	1/	1990	1991	1992	
	---Hectares---				---Metric tons---			
NORTH AMERICA								
Canada	365	300	250		855	650	525	
United States	1,409	1,785	1,874		3,469	4,037	4,218	
Total	1,774	2,085	2,124		4,324	4,687	4,743	
SOUTH AMERICA								
Argentina	6,800	8,350	8,700		5,604	6,340	9,700	
Bolivia	1,250	1,250	1,250		1,250	1,250	1,250	
Brazil	76,000	74,000	74,000		62,000	71,000	67,000	
Chile	102	81	159		477	357	713	
Colombia	14,078	13,490	13,790		21,229	20,428	20,892	
Ecuador	325	325	325		450	450	450	
Paraguay	2,800	3,550	5,100		6,021	7,705	11,000	
Peru	800	800	800		800	800	800	
Total	102,155	101,846	104,124		97,831	108,330	111,805	
CARIBBEAN								
Dominican Republic	12,165	15,700	15,700		9,818	19,600	19,600	
EC-12								
France	6,707	6,338	5,538		19,369	19,487	16,171	
Germany	280	280	280		470	470	470	
Italy	29,809	22,000	14,000		75,630	55,000	35,000	
Total	36,796	28,618	19,818		95,469	74,957	51,641	
EASTERN EUROPE								
Albania	24,000	24,000	24,000		15,000	15,000	15,000	
Hungary	3420	3810	3550		5662	8730	8200	
Poland	7,870	8,300	8,300		15,930	16,600	16,600	
Romania	4,235	3,230	8,000		3,160	4,845	11,000	
Total	39,525	39,340	43,850		39,752	45,175	50,800	
NORTH AFRICA								
Algeria	2,900	2,900	2,700		4,390	5,000	5,000	
Libya	300	300	300		533	533	533	
Morocco	101	74	50		402	319	150	
Total	3,301	3,274	3,050		5,325	5,852	5,683	
SUB-SAHARAN AFRICA								
Angola	500	500	500		500	500	500	
Burundi	2,000	2,000	2,000		1,600	1,600	1,600	
Congo	2,200	2,200	2,200		750	750	750	
Cote D' Ivoire	10,000	10,000	10,000		2,490	2,490	2,490	
Madagascar	1,000	1,000	1,000		1,300	1,300	1,300	
Malawi	4,660	5,500	3,000		1,635	2,100	800	
Mali	333	333	333		183	183	183	
Mozambique	400	400	400		230	230	230	
Nigeria	1,200	1,200	1,200		1,070	1,070	1,070	
South Africa	2,865	2,611	2,600		3,262	2,625	3,140	
Swaziland	100	100	100		100	100	100	
Togo	2,000	2,000	2,000		1,000	1,000	1,000	
Zaire	450	450	450		532	532	532	
Total	27,708	28,294	25,783		14,652	14,480	13,695	
ASIA								
Bangladesh	26,325	21,515	21,515		26,000	19,685	19,685	
Burma	49,200	49,200	49,200		31,800	31,800	31,800	
Cambodia	6,400	6,400	6,400		3,800	3,800	3,800	
China	150,000	100,000	105,000		237,000	100,000	110,000	
India	320,450	273,100	281,500		449,360	345,000	357,000	
Indonesia	147,100	140,000	115,000		88,235	92,470	75,000	
Korea, North	15,100	15,100	15,100		18,400	18,400	18,400	
Laos	2,850	2,850	2,850		1,975	1,975	1,975	
Pakistan	17,316	22,000	22,000		19,966	25,500	25,500	
Sri Lanka	1,726	1,726	1,726		1,654	1,654	1,654	
Vietnam	20,000	20,000	20,000		18,200	18,200	18,200	
Total	756,467	651,891	640,291		896,390	658,484	663,014	
MIDDLE EAST								
Iran	4,780	4,780	4,780		7,200	7,200	7,200	
Oman	1,800	1,800	1,800		2,000	2,000	2,000	
United Arab Em.	350	350	350		2,000	2,000	2,000	
Total	6,930	6,930	6,930		11,200	11,200	11,200	
OTHER 2/	786	731	731		765	769	769	
WORLD	987,607	878,709	862,401		1,175,526	943,534	932,950	

1/ Forecast.

2/ Includes Solomon Islands, Uruguay, Panama, Haiti, Ghana, St Vincent, and Benin.

TABLE 15
LIGHT AIR-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION		
	1990	1991	1992 1/	1990	1991	1992 1/
	----Hectares----			---Metric tons---		
NORTH AMERICA						
Mexico	2,931	2,050	2,030	4,090	3,740	1,940
United States	4,332	5,020	4,332	7,401	9,040	7,038
Total	7,263	7,070	6,362	11,491	12,780	8,978
SOUTH AMERICA						
Argentina	620	738	840	855	733	700
Brazil	8,000	10,000	10,000	13,000	14,000	18,000
Colombia	1,035	664	830	1,558	996	1,250
Peru	100	100	100	100	100	100
Total	9,755	11,502	11,770	15,513	15,829	20,050
CENTRAL AMERICA						
Costa Rica	430	355	441	882	613	893
Guatemala	214	201	203	244	319	259
Honduras	126	200	95	181	221	150
Nicaragua	140	140	140	300	300	300
Total	910	896	879	1,607	1,453	1,602
EC-12						
Germany	1,279	1,270	1,270	3,050	3,480	3,480
Italy	1,623	2,000	1,800	3,234	3,900	3,500
Total	2,902	3,270	3,070	6,284	7,380	6,980
SUB-SAHARAN AFRICA						
Cameroon	810	810	810	600	600	600
Congo	1,800	1,800	1,800	1,050	1,050	1,050
Madagascar	2,000	2,000	2,000	1,455	1,455	1,455
Niger	1,000	1,000	1,000	930	930	930
Nigeria	5,000	5,000	5,000	6,401	6,401	6,401
Reunion	100	100	100	100	100	100
South Africa	438	300	375	245	150	325
Zaire	370	370	370	532	532	532
Total	11,518	11,380	11,455	11,313	11,218	11,393
ASIA						
Bangladesh	0	6,135	6,135	0	6,580	6,580
India	3,750	3,550	6,600	6,000	5,500	12,000
Japan	1,744	1,463	1,300	4,217	3,377	3,100
Korea, South	6,800	6,800	6,800	9,200	9,200	9,200
Pakistan	1,264	1,675	2,000	4,126	5,662	6,500
Sri Lanka	3,479	3,479	3,479	1,090	1,090	1,090
Total	17,037	23,102	26,314	24,633	31,409	38,470
MIDDLE EAST						
Syria	245	477	450	257	583	410
WORLD	49,630	57,697	60,300	71,098	80,652	87,883

1/ Forecast.

JUNE 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 16
DARK AIR-CURED TOBACCO, CIGAR
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION		
	1990	1991	1992	1/	1990	1991
	----Hectares----			---Metric tons---		
NORTH AMERICA						
Canada	33	25	25	52	40	40
Mexico	0	1,280	800	0	2,060	1,080
United States	6,312	6,611	6,393	13,734	14,369	13,783
Total	6,345	7,916	7,218	13,786	16,469	14,903
SOUTH AMERICA						
Brazil	6,000	5,000	5,000	8,000	6,000	6,000
Colombia	132	190	174	200	282	270
Ecuador	125	125	125	125	125	125
Total	6,257	5,315	5,299	8,325	6,407	6,395
CENTRAL AMERICA						
Honduras	570	570	580	1,459	1,450	1,475
Nicaragua	450	450	450	950	950	950
Panama	180	180	180	95	95	95
Total	1,200	1,200	1,210	2,504	2,495	2,520
CARIBBEAN						
Cuba	50,000	50,000	50,000	44,000	44,000	44,000
Jamaica	628	628	628	1127	1127	1127
Total	50,628	50,628	50,628	45,127	45,127	45,127
EC-12						
Belgium-Lux	461	468	468	1553	450	1800
Spain	550	420	395	900	673	630
Total	1,011	888	863	2,453	1,123	2,430
EASTERN EUROPE						
Poland	46	20	20	70	30	30
SUB-SAHARAN AFRICA						
Cameroon	2,590	2,590	2,590	4,900	4,900	4,900
Cent. Afr. Rep.	750	750	750	650	650	650
Uganda	2,150	2,150	2,150	2,000	2,000	2,000
Total	5,490	5,490	5,490	7,550	7,550	7,550
ASIA						
Bangladesh	0	500	500	0	455	455
China	70,600	71,000	72,000	85,000	85,000	85,000
Indonesia	18,530	21,500	18,000	20,600	25,850	21,620
Philippines	12,000	14,000	14,000	11,230	15,000	14,000
Thailand	16,360	15,800	15,000	8,180	7,900	7,800
Total	117,490	122,800	119,500	125,010	134,205	128,875
OTHER 2/	326	299	335	332	298	353
WORLD	188,793	194,556	190,563	205,157	213,704	208,183

1/ Forecast.

2/ Includes Costa Rica, St. Vincent, Chad, and Turkey.

TABLE 17

DARK FIRE-CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	AREA			PRODUCTION		
	1990	1991	1992 1/	1990	1991	1992 1/
	----Hectares----			---Metric tons---		
NORTH AMERICA						
Mexico	800	800	1,200	960	960	1,780
United States	6,251	6,486	6,530	15,866	14,917	15,649
Total	7,051	7,286	7,730	16,826	15,877	17,429
SOUTH AMERICA						
Argentina	35	32	35	34	20	30
EC-12						
Italy	3,957	4,000	4,000	8,040	8,500	8,500
EASTERN EUROPE						
Poland	3648	4000	4000	9800	10560	10560
SUB-SAHARAN AFRICA						
Benin	66	66	66	133	133	133
Ghana	315	190	190	139	100	100
Kenya	3,055	3,055	3,055	3,712	3,712	3,712
Liberia	10	10	10	10	10	10
Malawi	25,400	33,000	30,000	14,000	22,000	15,000
Mali	333	333	333	183	183	183
Mozambique	80	80	80	170	170	170
Sierra Leone	198	198	198	200	200	200
Tanzania	2,832	2,832	2,832	3,000	3,000	3,000
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	1,350	1,350	1,350	986	986	986
Total	35,639	43,114	40,114	23,533	31,494	24,494
WORLD	50,330	58,432	55,879	58,233	66,451	61,013

1/ Forecast

JUNE 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

World sunflowerseed production for 1991/92 is estimated at 20.7 million tons, down 8 percent from last year's record 22.6 million. Harvested area is expected to reach a record 16.4 million hectares, up marginally from last year. Yield is estimated at 1.26 tons per hectare, down 9 percent from 1990/91 and 10 percent below the record level of 1.40 set in 1989/90. Total harvested area has increased over 32 percent since 1980, while production, bolstered by higher yields, has climbed over 68 percent during this period. The interest in sunflowerseed for its superior oil and meal products has encouraged many countries to increase or initiate production over the last 10 years. These include India, France, Italy, Morocco, Turkey, Venezuela, and Zimbabwe. In the United States, price competition and the opportunity to shift to more profitable crops reduced the area planted to sunflowers. However, in 1991, price incentives for minor oilseed crops in the United States sparked renewed interest in sunflower plantings. The accompanying table provides the official USDA database for harvested area, yield, and production from 1982/83 through 1991/92.

FORMER USSR: The newly independent states of the former Soviet Union are, as a group, both the world's largest producer and consumer of sunflowerseed, accounting for 27 percent of the world's total output. Sunflowerseed is the major oilseed crop in the former Soviet Union, accounting for nearly one-half of all domestic oilseed production. The next largest oilseed crop is cottonseed, which accounts for approximately 37 percent. Soybeans, rapeseed, and flaxseed together make up the bulk of the remaining 14 percent. The 1991/92 sunflowerseed harvest is estimated at 5.6 million tons from 4.5 million hectares, down 4 percent from last year's record area and well below the record 7.4 million tons harvested in 1973. Yield, estimated at 1.25 metric tons per hectare, is the lowest since 1984/85.

ARGENTINA: Argentina is the world's second largest single producer of sunflowerseed, accounting for 16 percent of total output. Second only to soybeans, sunflowerseed production accounts for 22 percent of Argentina's total oilseed output of 14.8 million tons in 1991/92. Sunflowerseed production is estimated at 3.3 million tons, 15 percent below last year's output of 3.9 million.

Sunflowers are grown throughout the Pampean region, with production concentrated in southwestern Buenos Aires province. Planted area has increased in recent years as farmers are increasingly satisfied with highly productive and drought-tolerant hybrids. Harvested area during 1991/92 reached 2.5 million hectares, up 0.2 million or 9 percent above 1990/91. However, unfavorable growing conditions late in the season reduced yields to 1.32 tons per hectare, the lowest level since 1983.

EC-12: The EC-12's 1992/93 sunflowerseed production is estimated at 3.9 million tons, down 0.3 million or 7 percent below the record crop of 1990/91. The EC-12 ranks as the world's second largest producer in 1991/92, up from sixth a decade ago. Spain and France are the largest producers, together accounting for 89 percent of area and 87 percent of production in 1991/92. The 1991 crop season was particularly dry in Spain. Sunflowers, more drought-resistant than grains, are suited to Spain's arid climate. However, losses in both area and yield due to dry weather reduced output to 0.9 million tons, down 31 percent from last season. In contrast, France experienced good growing conditions during 1991/92. While harvested area declined by 10 percent from 1990/91, yields pushed output to a record 2.5 million tons, up 0.1 million.

High yields and near record area in the EC-12 could have an elevating effect on the calculation of sunflowerseed support prices. Under the new oilseed price support regime, prices are based on area and adjusted for regional yield differences. For the 1992/93 crop, producers have expressed uncertainty and lack of familiarization with the new regime. This will likely temper producer planting decisions. Spain is an exception. It has estimated 1992/93 sunflowerseed area well above their threshold level and have requested an exemption from any price support penalties.

CHINA: Sunflowerseed is a relatively minor oilseed crop in China, yet its output is the world's fifth largest, contributing 5 percent of total production. The 1991/92 harvest is estimated at 1.1 million tons, down 18 percent from 1990/91 and 36 percent below the record 1.7 million tons produced in 1985/86. The Chinese primarily grow sunflowerseed for oil, but consumer demand for the seed as a snack food is increasing. Production is concentrated in the northern and western provinces of Inner Mongolia, Jilin, Zinjiang, Shanxi, and Hebei. Sunflowerseed area has been gradually declining from a peak of 1.47 million hectares in 1985/86 to 750,000 estimated for 1991/92. Sunflower producers have experienced problems with low yields due to disease and view other crops as more profitable. In 1989, the sunflowerseed crop was adversely affected by a severe summer drought. Production rebounded in 1990/91 due to improved weather and the incentive of higher government oilseed prices. Producers increased sunflower area in 1991/92, but a return to more normal growing conditions reduced yields by 22 percent from the previous year's level, to just above the 5-year average.

INDIA: While India boasts the world's third largest cultivated sunflower area, low yields place it in a tie with China for fifth position in terms of production. Producer interest in sunflowers has resulted in an increase in area of 1,500 percent in the past decade, from 119,000 hectares in 1980/81 to a record 1.8 million in 1991/92. Production during 1991/92 is estimated at 1.1 million tons, up 24 percent from the previous season. In addition to a 10-percent increase in area, the 1991/92 sunflower crop benefited from a favorable monsoon season.

EASTERN EUROPE: Eastern Europe ranks as the world's fourth largest producer of sunflowerseed, accounting for about 13 percent of world production. The 1991/92 crop is estimated at 2.2 million tons, up 83,000 tons or 4 percent from 1990/91. Hungary, with 32 percent of total production, is Eastern Europe's largest producer. Production in 1991/92 is estimated at 700,000 tons, up 4 percent from last season. Romanian output is pegged at 535,000 tons, down 4 percent from last year and down 47 percent below the record of 1.0 million tons produced in 1986/87. Yugoslavia harvested only 190,000 hectares in 1991/92, down 11 percent from 1990/91. As a result, output fell 10 percent, from 422,000 tons produced in 1990/91 to 380,000 in 1991/92, the smallest crop since 1985. Bulgaria harvested an estimated 442,000 tons in 1991/92, up 18 percent from last season. Yields were up an average of 4 percent from a year ago, while harvested area climbed to an estimated 270,000 hectares, the largest area in over a decade.

UNITED STATES: The National Agricultural Statistics Service estimates the 1991/92 sunflowerseed harvest at 1.6 million tons, up 0.6 million or 59 percent from 1990/91. Harvested area reached an estimated 1.1 million hectares, up 44 percent from last year. This is the largest harvested area since 1985. The U.S. sunflowerseed crop had been trending downward since the record harvest of 3.3 million tons set in 1979. During 1991, producers planted more sunflowers in response to the new price protection incentives outlined for minor oilseed crops in last year's farm legislation. Located mainly in the Northern Plains of the United States, sunflowerseed competes mainly with spring wheat and barley for area. Higher prices for wheat this past year have led producers to indicate a slight reduction in their sunflowerseed acres for 1992.

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TABLE 18
World Sunflowerseed Harvested Area
(1,000 hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	Prel. 90/91	Est. 91/92	91/92 Change Amount	91/92 Change Percent
<i>World Total</i>	13,387	13,269	14,350	15,809	14,112	15,522	14,960	15,643	16,394	16,400	6	0.0
Former USSR	4,250	4,266	3,907	4,053	3,848	4,156	4,280	4,460	4,665	4,500	-165	-3.5
Argentina	1,902	1,989	2,350	3,046	1,800	2,058	2,200	2,800	2,300	2,500	200	8.7
EC-12	1,228	1,472	1,646	2,020	2,148	2,300	2,164	2,125	2,600	2,350	-250	-9.6
Spain	870	950	1,007	1,215	1,070	994	921	977	1,201	1,070	-131	-10.9
France	283	416	476	591	849	965	951	907	1,140	1,028	-112	-9.8
Italy	51	72	83	94	104	200	165	134	173	146	-27	-15.6
Portugal	20	25	38	40	44	43	75	66	50	47	-3	-6.0
Germany	0	0	0	0	2	8	10	15	18	44	26	144.4
Greece	4	9	42	80	79	90	42	26	18	15	-3	-16.7
India	462	696	835	750	992	1,651	1,104	1,192	1,642	1,800	158	9.6
Eastern Europe	1,206	1,137	1,158	1,211	1,332	1,375	1,311	1,265	1,227	1,266	39	3.2
Romania	496	490	480	466	470	455	444	434	395	400	5	1.3
Hungary	297	287	317	343	391	376	363	356	346	350	4	1.2
Bulgaria	253	262	253	267	255	266	265	240	238	270	32	13.4
Yugoslavia	138	76	81	112	189	251	209	204	214	190	-24	-11.2
Czechoslovakia	22	22	27	23	27	27	30	31	34	56	22	64.7
United States	1,912	1,240	1,494	1,151	791	718	777	723	749	1,081	332	44.3
China	814	733	1,013	1,474	1,107	887	830	716	713	750	37	5.2
Turkey	530	550	565	643	689	775	700	800	700	550	-150	-21.4
Rep. of South Africa	325	322	310	323	383	462	410	519	575	454	-121	-21.0
Zimbabwe	16	36	35	51	87	100	102	123	152	170	18	11.8
Morocco	19	20	29	34	44	60	88	110	160	145	-15	-9.4
Burma	110	140	161	233	249	261	182	134	150	176	26	17.3
Canada	77	47	89	71	26	34	43	55	65	86	21	32.3
Tanzania	80	80	81	81	81	81	83	84	85	85	0	0.0
Australia	176	234	354	277	178	202	185	66	198	74	-124	-62.6
Uruguay	28	62	39	75	44	44	57	48	65	68	3	4.6
Ethiopia	61	61	61	61	61	61	61	61	61	61	0	0.0
Zambia	48	58	63	60	30	35	42	44	45	40	-5	-11.1
Pakistan	23	18	20	33	45	43	29	26	47	40	-7	-14.9
Egypt	6	5	7	7	7	8	10	11	18	30	12	66.7
Mozambique	35	35	35	35	35	35	35	35	35	30	-5	-14.3
Austria	0	0	0	1	1	11	21	25	23	25	2	8.7
Venezuela	0	0	0	0	15	45	115	110	20	20	0	0.0
Iran	10	10	19	19	19	19	19	19	19	19	0	0.0
Israel	9	6	5	6	6	6	6	9	4	16	12	300.0
Kenya	14	14	14	15	16	16	16	16	16	15	-1	-6.3
Iraq	9	12	13	12	11	12	14	14	14	14	0	0.0
Mexico	20	10	12	17	15	12	16	12	12	12	0	0.0
Chile	3	5	20	30	19	23	15	16	14	12	-2	-14.3
Syria	4	3	7	6	15	15	19	10	10	10	0	0.0
Uganda	5	5	5	5	5	5	5	5	5	5	0	0.0
Paraguay	0	0	0	6	7	7	6	4	4	4	0	0.0
Brazil	5	3	3	3	3	4	12	4	4	4	0	0.0
Colombia	0	0	0	0	3	1	3	2	1	2	1	100.0

TABLE 19

World Sunflowerseed Yields

(Metric tons per hectare)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	Prel. 90/91	Est. 91/92	91/92 Change Amount	91/92 Change Percent
World Average	0.97	0.99	1.01	1.07	1.25	1.31	1.24	1.40	1.38	1.26	-0.12	-8.5
Argentina	1.26	1.11	1.45	1.35	1.39	1.36	1.46	1.36	1.70	1.32	-0.38	-22.2
Australia	0.59	0.73	0.83	0.78	0.82	1.06	0.93	1.11	0.94	1.05	0.12	12.2
Austria	0.00	0.00	0.00	1.00	1.00	3.18	2.67	2.92	2.44	2.96	0.52	21.6
Brazil	0.80	1.00	1.00	1.00	1.00	1.50	1.08	1.25	1.25	1.25	0.00	0.0
Bulgaria	2.02	1.73	1.83	1.37	1.92	1.54	1.39	1.86	1.57	1.64	0.07	4.2
Burma	0.64	0.81	0.88	0.93	1.02	0.85	0.71	0.66	0.66	0.63	-0.03	-5.1
Canada	1.22	1.09	1.08	1.16	1.39	1.53	1.12	1.26	1.69	1.59	-0.10	-5.9
Chile	1.67	1.40	1.50	1.83	1.79	2.13	2.13	2.06	2.29	2.25	-0.04	-1.6
China	1.58	1.83	1.68	1.18	1.40	1.40	1.42	1.49	1.88	1.47	-0.41	-21.9
Colombia	0.00	0.00	0.00	0.00	1.67	2.00	1.33	1.50	1.00	1.50	0.50	50.0
Czechoslovakia	1.64	1.86	1.59	1.83	2.30	2.30	2.07	2.26	2.32	2.32	0.00	-0.1
Egypt	2.17	2.00	1.86	2.14	2.14	1.75	1.80	1.91	2.28	2.00	-0.28	-12.2
Ethiopia	0.36	0.36	0.36	0.36	0.36	0.36	0.36	0.36	0.36	0.36	0.00	0.0
France	2.30	1.99	2.01	2.50	2.24	2.60	2.46	2.34	2.12	2.47	0.35	16.6
Germany	0.00	0.00	0.00	0.00	2.00	3.00	3.00	3.20	3.06	2.05	-1.01	-33.1
Greece	2.00	2.22	1.60	2.04	2.08	1.61	1.79	2.04	1.61	2.40	0.79	49.0
Hungary	1.96	2.07	1.89	1.96	2.19	2.09	1.95	1.94	1.95	2.00	0.05	2.8
India	0.50	0.43	0.53	0.37	0.44	0.39	0.34	0.53	0.54	0.56	0.02	2.8
Iran	0.50	0.50	0.74	0.74	0.74	0.74	0.74	0.74	0.74	0.74	0.00	0.0
Iraq	0.67	0.83	0.77	0.92	0.82	0.83	0.79	0.79	0.79	0.79	0.00	0.0
Israel	1.00	0.83	2.00	1.67	1.50	1.17	1.17	1.89	3.00	1.21	-1.79	-59.5
Italy	1.78	1.82	1.76	1.72	2.45	2.25	2.21	2.54	2.33	2.38	0.05	2.4
Kenya	1.21	1.07	1.29	1.27	1.25	1.25	1.25	1.25	1.25	1.33	0.08	6.6
Mexico	0.65	1.00	1.25	1.18	1.00	0.83	0.63	0.83	0.83	0.83	0.00	0.0
Morocco	0.63	0.80	0.66	0.74	0.73	0.78	1.00	0.96	1.00	0.75	-0.25	-24.8
Mozambique	0.57	0.57	0.57	0.57	0.57	0.57	0.57	0.57	0.57	0.50	-0.07	-12.4
Pakistan	0.83	0.83	0.90	0.82	0.71	1.00	1.17	0.96	1.17	1.03	-0.15	-12.4
Paraguay	0.00	0.00	0.00	0.83	1.14	1.29	1.17	1.00	1.00	1.00	0.00	0.0
Portugal	0.65	1.12	0.74	0.73	0.75	0.65	0.77	0.68	0.90	0.72	-0.18	-19.7
Romania	1.71	1.43	1.77	1.52	2.14	1.43	1.31	1.51	1.41	1.34	-0.07	-5.0
Rep. of South Africa	0.62	0.56	0.76	0.84	1.06	1.17	1.04	1.21	1.02	0.39	-0.63	-61.9
Spain	0.86	0.79	1.09	0.82	0.86	1.01	1.22	0.95	1.10	0.82	-0.28	-25.8
Syria	1.50	2.00	0.86	1.50	1.00	1.00	0.79	1.00	1.00	1.00	0.00	0.0
Tanzania	0.53	0.53	0.52	0.52	0.52	0.52	0.40	0.26	0.29	0.29	0.00	0.0
Turkey	1.13	1.25	1.26	1.09	1.36	1.16	1.57	1.50	1.23	1.18	-0.05	-3.8
Uganda	0.40	0.40	0.40	0.40	0.40	0.40	0.40	0.40	0.40	0.60	0.20	50.0
Former USSR	1.26	1.19	1.16	1.30	1.37	1.46	1.45	1.59	1.41	1.25	-0.15	-10.9
United States	1.27	1.17	1.14	1.24	1.54	1.65	1.05	1.10	1.38	1.51	0.14	9.9
Uruguay	0.68	0.42	0.80	1.07	0.75	0.75	0.84	0.60	0.88	0.88	0.01	0.6
Venezuela	0.00	0.00	0.00	0.00	0.73	0.76	0.78	0.91	1.00	1.00	0.00	0.0
Yugoslavia	1.46	1.83	1.90	2.08	2.38	1.94	1.96	2.06	1.97	2.00	0.03	1.4
Zambia	0.67	0.74	0.67	0.50	0.63	0.57	0.48	0.82	0.56	0.45	-0.11	-19.1
Zimbabwe	0.31	0.42	0.51	0.37	0.25	0.47	0.47	0.52	0.45	0.18	-0.27	-59.3

TABLE 20
World Sunflowerseed Production
(1,000 metric tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	Prel.	Est.	91/92 Change
									90/91	91/92	Amount Percent
<i>World Total</i>	16,687	15,510	17,986	19,560	19,252	20,914	20,365	21,891	22,580	20,667	-2,129 -9.4
Former USSR	5,341	5,063	4,527	5,260	5,258	6,075	6,200	7,070	6,559	5,640	-919 -14.0
EC-12	1,512	1,757	2,299	2,821	3,278	4,161	3,986	3,540	4,247	3,948	-299 -7.0
France	650	828	958	1,477	1,902	2,508	2,335	2,125	2,415	2,540	125 5.2
Spain	750	750	1,100	990	920	1,006	1,123	929	1,300	900	-400 -30.8
Italy	91	131	146	162	255	450	365	340	403	348	-55 -13.6
Germany	0	0	0	0	4	24	30	48	55	90	35 63.6
Greece	8	20	67	163	164	145	75	53	29	36	7 24.1
Portugal	13	28	28	29	33	28	58	45	45	34	-11 -24.4
Argentina	2,400	2,200	3,400	4,100	2,500	2,800	3,200	3,800	3,900	3,300	-600 -15.4
Eastern Europe	2,178	1,927	2,110	2,023	2,861	2,395	2,127	2,285	2,104	2,187	83 3.9
Hungary	582	593	600	673	857	787	708	692	673	700	27 4.0
Romania	847	700	851	710	1,004	650	580	656	556	535	-21 -3.8
Bulgaria	511	454	462	365	489	410	367	447	374	442	68 18.2
Yugoslavia	202	139	154	233	449	486	410	420	422	380	-42 -10.0
Czechoslovakia	36	41	43	42	62	62	62	70	79	130	51 64.6
United States	2,419	1,451	1,698	1,430	1,214	1,183	813	798	1,031	1,637	606 58.8
China	1,286	1,340	1,704	1,732	1,544	1,241	1,180	1,064	1,339	1,100	-239 -17.8
India	230	300	440	280	436	635	370	631	889	1,100	211 23.7
Turkey	600	685	710	700	940	895	1,100	1,200	860	650	-210 -24.4
Rep. of South Africa	202	180	235	272	404	540	428	626	589	173	-416 -70.6
Canada	94	51	96	82	36	52	48	69	110	137	27 24.5
Morocco	12	16	19	25	32	47	88	105	160	109	-51 -31.9
Burma	70	114	141	216	253	221	129	89	96	106	10 10.4
Australia	104	170	293	215	145	215	172	73	186	78	-108 -58.1
Austria	0	0	0	1	1	35	56	73	56	74	18 32.1
Uruguay	19	26	31	80	33	33	48	29	57	60	3 5.3
Egypt	13	10	13	15	15	14	18	21	41	60	19 46.3
Pakistan	19	15	18	27	32	43	34	25	55	41	-14 -25.5
Zimbabwe	5	15	18	19	22	47	48	64	68	31	-37 -54.4
Israel	9	5	10	10	9	7	7	17	12	29	17 141.7
Chile	5	7	30	55	34	49	32	33	32	27	-5 -15.6
Tanzania	42	42	42	42	42	42	33	22	25	25	0 0.0
Ethiopia	22	22	22	22	22	22	22	22	22	22	0 0.0
Venezuela	0	0	0	0	11	34	90	100	20	20	0 0.0
Kenya	17	15	18	19	20	20	20	20	20	20	0 0.0
Zambia	32	43	42	30	19	20	20	36	25	18	-7 -28.0
Mozambique	20	20	20	20	20	20	20	20	20	15	-5 -25.0
Iran	5	5	14	14	14	14	14	14	14	14	0 0.0
Iraq	6	10	10	11	9	10	11	11	11	11	0 0.0
Syria	6	6	6	9	15	15	15	10	10	10	0 0.0
Mexico	13	10	15	20	15	10	10	10	10	10	0 0.0
Brazil	4	3	3	3	3	6	13	5	5	5	0 0.0
Paraguay	0	0	0	5	8	9	7	4	4	4	0 0.0
Colombia	0	0	0	0	5	2	4	3	1	3	2 200.0
Uganda	2	2	2	2	2	2	2	2	2	3	1 50.0

SAUDI GRAIN PRODUCTION

Agriculture is becoming increasingly important to the Saudi economy. Cereal cultivation currently accounts for 87 percent of the country's arable land. From 1981 to 1991, area planted to grains grew from 0.4 million to 0.9 million hectares. Grain yields increased even more dramatically during the same period, rising from 0.75 tons per hectare to 4.42 tons per hectare. Wheat production alone jumped from 0.2 million tons in 1981 to 4.0 million in 1991. Total grain production for 1992/93 is forecast at 4.0 million tons, down 0.5 million from last year due to a decline in wheat production.

WHEAT: Wheat is the largest Saudi crop in terms of cultivated area and production, accounting for 60 percent of all cropland, including area devoted to vegetables and tree crops. Wheat self-sufficiency was achieved in 1984 and production reached a record of 4.0 million tons in 1991/92. However, during the 1992/93 growing season, extremely cold temperatures during February through early March 1992 reduced yield potential and output is currently forecast at 3.5 million tons.

Planting occurs from November through January, with the harvest beginning in April and continuing until June. Wheat is principally produced in four areas: Riyadh, which produces 48 percent; Qaseem, 32 percent; Hail, 11 percent; and, the Northern Region producing 5 percent. Virtually all wheat is irrigated and farmers utilize high levels of fertilizers and pesticides resulting in yields nearly double the U.S. average.

Due to the Kingdom's arid climate, harvested wheat is very hard and dry, resulting in good milling and baking qualities. The Yocoro Rojo variety, a hard red winter wheat, accounts for nearly 99 percent of production. Yocoro Rojo has been cropped consistently for nearly 10 years. Some progressive farmers recently expressed concern about it's inability to withstand this year's colder-than-normal temperatures.

BARLEY: The 1992/93 barley crop is estimated at a record 0.4 million tons, marginally above last year's harvest. Since 1985, barley area and production have expanded each year. The steady increase is primarily due to favorable government policies and subsidies. In spite of the increases, barley production only meets a small percentage of domestic demand.

Forty percent of the crop is produced in Riyadh, with 24 percent produced in Hail, 16 percent in the Eastern Region, and 10 percent in the Northern Region. Barley is grown as a winter crop. The Gustoe variety is the most widely grown and is used as an animal feed, both as a whole grain or as a component of compound feed rations.

SUMMER COARSE GRAINS: Sorghum and corn are not significant crops in Saudi Arabia. Production for both crops is expected to remain unchanged from last year's level of 80,000 and 4,000 tons, respectively. Unlike production of the winter grains, summer grain production has declined in recent years.

Sorghum is mainly produced in the southern parts of the country, with production centered in Jizan (75 percent), Mecca (12 percent), and Aseer (10 percent). Most of the crop is rainfed. Sorghum is used for human consumption and, to a lesser extent, for animal feed. Production is handled by the private sector and the Government does not offer any incentives for production.

Corn is produced primarily on small farms in the south. Twenty-three percent of production is from Al-Baha, 22 percent from Riyadh, 20 percent from Jizan, 14 percent from Aseer, and 13 percent from Mecca. Corn is grown for human consumption and used in poultry and dairy compound feed rations. Corn silage is used as a green fodder on dairy farms.

POLICY: Government's role in the agricultural sector is centered around formulating policy, defining objectives, supporting private enterprise, and providing subsidies. In spite of significant increases in grain production, the sector has not kept pace with the country's overall food demand. The Government is responding to the disparity by encouraging diversification and expansion of grain production other than wheat.

Since 1988, the Government has encouraged farmers to plant less wheat and expand barley area. Various steps were instituted to achieve these objectives; however, success has been very limited. Farmers continue to grow wheat because production costs for wheat and barley are nearly the same, but the Government's Guaranteed Purchase Price for wheat is twice that for barley.

BACKGROUND: Saudi Arabia occupies a total land area of 2.2 million square kilometers. Only 1.4 percent of this area is used for crop production, with wheat, barley, date palms, fodder, and vegetables being the major crops. Historically, the Saudi economy has been based on subsistence agriculture, specifically dates and animal production. During the last 20 to 30 years, the wealth generated from oil allowed rapid modernization and industrial development. Since the early seventies, government investment and imported technology have enabled major strides in agricultural production. Agriculture is now a major source of income for over 15 percent of the Saudi labor force. Saudi Arabia, which has a predominantly arid desert climate, is subject to severe extremes of temperature. The soils are mostly aridisols and have a sandy texture, which limits soil fertility. Soil pH is high and phosphorus content low. Producing field crops requires extensive use of inputs and since nearly all crops are irrigated, yields are primarily determined by the level of these inputs.

Rainfall is generally low and occurs between October and April, with most areas receiving between 50 and 100 millimeters. Rainfed agriculture is not feasible except in the southwest where the crops are supplemented with irrigation water supplied from recently built dams. All agricultural production primarily is based on water from wells and non-renewable underground aquifers. The aquifers provide over 80 percent of the agricultural water requirements. Large-scale land holdings are comprised of 50-hectare irrigated fields where central pivot irrigation is common.

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TABLE 21

Saudi Grains

AREA HARVESTED		(1,000 hectares)						(1,000 metric tons)					
		1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92	1992/93
WHEAT	60	137	264	470	500	600	630	710	730	710	740	740	
BARLEY	7	7	7	7	7	7	7	40	80	65	75	85	90
SORGHUM	350	360	360	360	360	360	360	45	45	70	70	70	70
CORN	3	3	3	3	3	3	3	2	2	2	2	3	3
TOTAL GRAINS	420	507	634	840	870	987	717	837	867	857	898	903	
YIELD		(Metric tons per hectare)						(1,000 metric tons)					
WHEAT	3.12	3.01	2.69	2.98	4.09	3.81	3.81	4.51	4.40	5.07	5.41	4.73	
BARLEY	1.74	1.74	1.74	1.74	1.74	1.74	1.74	2.00	2.50	4.62	5.00	4.71	4.56
SORGHUM	0.31	0.31	0.31	0.31	0.31	0.31	0.29	1.20	1.20	1.07	1.14	1.14	1.14
CORN	1.33	1.33	1.33	1.67	1.67	1.67	1.50	1.50	1.00	1.00	1.50	1.50	1.33
TOTAL GRAINS	0.75	1.06	1.32	1.82	2.50	2.46	3.54	4.13	4.13	4.74	4.99	4.42	
PRODUCTION		(1,000 metric tons)						(1,000 metric tons)					
WHEAT	187	412	710	1,402	2,047	2,285	2,400	3,200	3,208	3,600	4,000	3,500	
BARLEY	12	12	12	12	12	12	12	80	200	300	375	400	410
SORGHUM	110	110	110	110	110	110	110	105	54	75	80	80	80
CORN	4	4	5	5	5	5	5	30	2	2	3	4	4
TOTAL GRAINS	313	538	837	1,529	2,174	2,432	2,536	3,456	3,585	4,058	4,484	3,994	

PROCESSING TOMATO PRODUCTION IN SELECTED COUNTRIES

Output of tomatoes for processing in 11 major producing countries is estimated at 16.5 million tons in 1992, down 12 percent from 1991. Preliminary information on plantings indicates 1992 harvested area in the 11 countries will be down 10 to 15 percent compared to 1991. The United States is expected to account for most of the area decline. The EC-12 also is expected to show a decline in area. Production of processing tomatoes in the Mediterranean Basin (five EC-12 countries plus Turkey and Israel) is expected to decline about 3 percent in 1992.

In the United States, processing tomato production under contract is forecast at 8.0 million tons, 19 percent below the 1991 level. Contracted area is down 25 percent from 1991, to 110,000 hectares, because processors cut back after last year's record crop. Mexico's processing tomatoes are harvested during the winter months. Production for 1992 is estimated at 317,000 tons, down 21 percent from 1991. Extremely heavy rains in December, January, and February adversely affected tomato crops throughout Mexico, particularly in the state of Sinaloa where the major producing regions are located. In addition, a larger-than-normal amount of substitution occurred between the fresh market and processing sectors due to harvesting problems and wide price differentials.

The 1992 harvest of processing tomatoes for the 5 EC-12 countries is estimated at 6.1 million tons, 6 percent below 1991, due to larger stocks of tomato products and dry weather in Spain and Portugal. EC-12 support prices in ECU terms are unchanged from 1991. The overall EC-12 quota also remains at the 1991 level of 6,561,787 tons, but the quota is being applied at the EC-12 level rather than pro-rated among the individual countries. In the event that the quota is exceeded, the EC-12 will proportionately reduce processor subsidies.

Italian output of processing tomatoes is forecast at 3.4 million tons, the same level as produced in 1991. Similarly, harvested area is expected to remain stable at 82,000 hectares. Given the change in the EC-12 quota system, a production increase in 1992 is possible, according to processors. However, the Government maintains that high stocks and a small reduction in the processing subsidy will keep production stable.

In Greece, early-season forecasts place the 1992 processing tomato crop at 1.1 million tons, 5 percent below 1991. Large carry-over stocks of tomato products and a lack of government encouragement to expand plantings are expected to result in a small reduction in planted area. In past years, the Government has encouraged area expansion to ensure that Greece completely filled its EC-12 quota.

Spain's production of processing tomatoes for 1992 is estimated at 760,000 tons, significantly below the 872,000 tons produced in 1991. In turn, the 1991 harvest was only three-fourths as large as the 1990 crop primarily due to the unfavorable world market situation. This year, as in 1991, excessive stock levels have hurt prospects for profitable production.

Portugal's output of processing tomatoes for 1992 is forecast at 500,000 tons, 29 percent below the reduced 1991 crop. A severe drought throughout much of the country caused a decline in area and is expected to result in reduced yields when the crop is harvested in July and August. Last year's 14-percent decline in output was due to reduced contracting by processors who found it difficult to meet EC-12 and international competition. Losing their market for tomato products in the newly independent states of the former USSR has added to the difficulties Portuguese processors face in export markets.

France's output of processing tomatoes declined 2 percent in 1991 and a similar decline is forecast for 1992. The downturn reflects the continuing difficulties French producers have competing with lower-priced imports.

In Turkey, early-season forecasts indicate 1992 processing tomato production will total 1.5 million tons, 14 percent above the 1991 level. Reduced stocks of tomato products and better wholesale prices at the beginning of the season encouraged growers to boost 1992 production.

Israel's 1992 output of processing tomatoes is estimated at 120,000 tons, 29 percent below 1991. Irrigation water is more plentiful this year, but a reduction in the support price has had a negative effect on plantings for the 1992 season.

Taiwan's 1992 output of processing tomatoes (harvested December 1991 through April 1992) is estimated at 135,000 tons, 11 percent smaller than the 1991 crop. The decline reflects growers' unwillingness to boost production given Taiwan's processors' lack of competitiveness in the Japanese market.

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TABLE 22

PROCESSING TOMATO PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric tons)

	1989	1990	1991	Forecast 1992
NORTHERN HEMISPHERE				
United States	8,604	9,394	9,864	7,966 1/
Canada	539	580	420	380
Mexico	317	365	400	317
Total	9,460	10,339	10,684	8,663
MEDITERRANEAN				
European Community				
Italy	3,800	3,800	3,400	3,400
France	324	326	320	315
Greece	1,400 2/	1,090 3/	1,187 4/	1,125
Spain	976	1,140	872	760
Portugal	617	823	706	500
Total	7,117	7,179	6,485	6,100
OTHER MEDITERRANEAN				
Turkey	1,700	1,450	1,320	1,500
Israel	329	370	168	120
Total	2,029	1,820	1,488	1,620
TOTAL MEDITERRANEAN	9,146	8,999	7,973	7,720
Taiwan	220	182	151	135
GRAND TOTAL	18,826	19,520	18,808	16,518

1/ Contract production only.

2/ Includes 8,000 tons withdrawn from the market and approximately 100,000 tons not delivered to processors.

3/ Includes 81,000 tons diverted to the fresh market.

4/ Includes 19,000 tons withdrawn from the market and approximately 40,000 tons diverted to the fresh market.

Citrus production in selected major producing countries is expected to total 50.7 million tons in 1991/92, up 3 percent from the revised 1990/91 level of 49.4 million tons. Production in the Northern Hemisphere--where the peak of the 1991/92 harvest is over--is estimated at 32.5 million tons, up less than 1 percent from last year, but 2 percent above the December 1991 forecast. The initial forecast for the Southern Hemisphere--where harvesting of the 1991/92 citrus crops has just begun--is 18.2 million tons, up 7 percent from 1990/91.

Orange production in the 19 specified countries is estimated at 35.6 million tons, up 4 percent from 1990/91, but slightly below the 1988/89 record. The increase primarily is due to higher production levels in Brazil and the United States following last season's weather-reduced crops. Tangerine production is forecast at 6.3 million tons, down 2 percent from 1990/91, because of Government-sponsored reductions in Japan and a smaller-than-anticipated crop in Spain. Grapefruit production is forecast at 3.3 million tons, down 3 percent from last season mainly due to smaller crops in Israel and the United States. Lemon production is expected to decline marginally, to 3.4 million tons.

SOUTHERN HEMISPHERE

Favorable weather in Argentina and Brazil and an increase in the number of bearing-age trees in Australia are expected to boost 1991/92 citrus production in the Southern Hemisphere (1991/92 refers to the Southern Hemisphere crop harvested in 1992). However, the increase will be dampened somewhat by drought-induced production decreases in South Africa.

BRAZIL: The 1991/92 citrus crop (usually harvested from May through December) is expected to total 14.6 million tons, up 7 percent from 1990/91 due to favorable weather in Sao Paulo following the second orange bloom. However, the harvest is expected to be about 40 days late. Orange production is expected to total 13.2 million tons, up 7 percent from 1990/91 and the second largest crop since the record harvest of 14.2 million tons in 1988/89.

ARGENTINA: Citrus production for 1991/92 is forecast at a record 1.7 million tons, up 10 percent from 1990/91. The orange crop is estimated at 750,000 tons, a 17-percent increase from last season. The lemon crop, at 570,000 tons, is unchanged from last year.

SOUTH AFRICA: The 1991/92 citrus crop is forecast at 863,000 tons, down 9,000 tons from 1990/91. Orange production is projected at only 665,000 tons, a 13,000 ton drop from last season, due to anticipated lower yields because of drought.

AUSTRALIA: Due to an increase in the number of bearing trees, citrus production in 1991/92 is forecast at 619,000 tons, up 5 percent from the revised 1990/91 crop of 588,000. Orange production for 1991/92 is expected to increase by 5 percent, to 509,000 tons. Although Valencia oranges still account for 60 percent of production, most new trees coming into production are the navel variety, mainly for export.

URUGUAY: An increase in the number of bearing-age trees is expected to boost Uruguay's citrus production for 1991/92 by 14 percent, to 259,000 tons. Lemon output is expected to return to a more normal level of 52,000 tons.

CHILE: Because of a projected 2,000 ton drop in lemon production, to 70,000, and a potential 1,000 ton reduction in orange output, to 117,000, citrus production in Chile is projected to decline to 187,000 tons in 1991/92. The downturn is due to inclement spring weather during the flowering and early growth stages last September and October.

NORTHERN HEMISPHERE

UNITED STATES: Citrus production for 1991/92 is estimated at 11.2 million tons, up 9 percent from 1990/91 and 4 percent above the December 1991 forecast. The increase from the December projection is primarily due to higher-than-anticipated production in California. U.S. orange production for 1991/92 is estimated at 8.1 million tons, up 13 percent from 1990/91. Grapefruit production is expected to be slightly below 2.0 million tons, a 3-percent decline from last season. Lemon production is forecast at 676,000 tons, up 3 percent from 1990/91.

MEXICO: Citrus production for 1991/92 is estimated at 3.1 million tons, down 6 percent from last season, but up 50,000 tons from the December estimate due to increased orange production. Dry weather caused excessive flower drop during the orange crop's first bloom period. However, timely late-season rains were responsible for above-normal flowering during the second and third bloom stages. This favorable development was diminished by heavy rains in January and February 1992 which caused above-normal fruit drop.

SPAIN: The 1991/92 citrus crop is estimated at 4.4 million tons, down 8 percent from the revised 1990/91 production level of 4.8 million, but up 1 percent from the December projection. Reportedly, orange and tangerine fruit quality is below average this season due to a high incidence of spotting that developed soon after harvesting. In most producing areas, bloom conditions for the 1992/93 crops were only fair-to-average due to unusually high temperatures.

GREECE: Citrus production for 1991/92 is estimated at 975,000 tons, down 9 percent from 1990/91 due to drought and freeze damage, but up 4 percent from the December 1991 forecast. Orange production is estimated at 770,000 tons, down 6 percent from 1990/91, but up 10 percent from the December estimate. Lemon production is expected to total only 120,000 tons, down 29 percent from last season and 20 percent below the December estimate, primarily because of the drought.

ITALY: The 1991/92 citrus crop is estimated at 3.2 million tons, up 10 percent from the drought-damaged 1990/91 harvest, but nearly unchanged from the December forecast. Orange production is expected to increase to 2.0 million tons in 1991/92, up from 1.8 million last season.

JAPAN: Citrus production for 1991/92 is estimated at 2.1 million tons, down 7 percent from 1990/91 and 3 percent below the December forecast, mainly due to storm damage last September. Because of the storm damage, the 1991/92 tangerine crop--which accounts for 90 percent of Japan's citrus production--reportedly is down 7 percent even though this is an "on year" in the alternate bearing cycle.

MOROCCO: The weather-damaged 1991/92 crop is estimated at 1.1 million tons, down 22 percent from 1990/91. The 1.1 million ton estimate is slightly above the December forecast primarily because of an unexpected increase in tangerine production.

TABLE 23

CITRUS PRODUCTION

(1,000 Metric tons)

	1987/88	1988/89	1989/90	1990/91	1991/92	1/
Cuba						
Oranges	508	474	604	600	600	
Tangerines	25	26	17	15	15	
Grapefruit	285	385	264	332	332	
Citrus, other	80	62	69	66	66	
Total	898	947	954	1,013	1,013	
Cyprus						
Oranges	138	170	223	174	173	
Tangerines	6	11	12	12	10	
Grapefruit	96	115	118	118	100	
Fresh Lemons	46	63	66	54	50	
Total	286	359	419	358	333	
Egypt						
Oranges	1,387	1,199	1,397	1,574	1,600	
Tangerines	134	151	170	257	265	
Grapefruit	2	2	2	2	2	
Lemons	2	2	2	2	2	
Citrus, other	138	190	240	410	420	
Total	1,663	1,544	1,811	2,245	2,289	
Gaza Strip						
Oranges	83	98	171	116	120	
Grapefruit	10	14	13	11	12	
Lemons	12	13	13	10	10	
Total	105	125	197	137	142	
Greece						
Oranges	462	770	932	819	770	
Tangerines	49	69	75	74	75	
Grapefruit	5	6	7	7	6	
Lemons	89	170	189	169	120	
Citrus, other	3	4	4	4	4	
Total	608	1,019	1,207	1,073	975	
Israel						
Oranges	627	546	877	567	550	
Tangerines	122	90	127	92	97	
Grapefruit	314	353	373	384	317	
Lemons	47	37	40	36	37	
Citrus, Other	14	16	25	25	25	
Total	1,124	1,042	1,442	1,104	1,026	
Italy						
Oranges	1,343	2,170	2,067	1,820	2,000	
Tangerines	333	411	476	445	500	
Grapefruit	3	7	8	7	9	
Lemons	592	708	667	620	680	
Citrus, other	42	18	38	39	40	
Total	2,313	3,314	3,256	2,931	3,229	
Japan						
Oranges	67	58	54	50	38	
Tangerines	2,941	2,387	2,375	1,993	1,860	
Lemons	2	2	2	2	2	
Citrus, other	288	227	201	170	155	
Total	3,298	2,674	2,632	2,215	2,055	

FOOTNOTES AT END OF TABLE

JUNE 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 23 (Continued)

CITRUS PRODUCTION
(1,000 Metric tons)

	1987/88	1988/89	1989/90	1990/91	1991/92	1/
Mexico						
Oranges	1,900	2,000	1,900	2,300	2,100	
Tangerines	151	157	169	170	165	
Grapefruit	105	75	95	100	110	
Lemons	9	9	7	5	5	
Citrus, other	672	680	680	700	714	
Total	2,837	2,921	2,851	3,275	3,094	
Morocco						
Oranges	891	994	775	1,103	790	
Tangerines	303	420	223	311	294	
Grapefruit	4	4	4	4	4	
Lemons	20	21	20	20	20	
Citrus, other	16	12	28	30	30	
Total	1,234	1,451	1,050	1,468	1,138	
Spain						
Oranges	2,442	2,216	2,400	2,590	2,490	
Tangerines	1,307	1,260	1,084	1,575	1,400	
Grapefruit	18	22	22	20	21	
Lemons	760	733	660	630	510	
Citrus, other	16	15	13	12	13	
Total	4,543	4,246	4,179	4,827	4,434	
Turkey						
Oranges	700	740	740	735	850	
Tangerines	280	310	336	345	320	
Grapefruit	27	30	28	37	40	
Lemons	220	300	335	360	400	
Citrus, other	5	5	4	4	4	
Total	1,232	1,385	1,443	1,481	1,614	
United States						
Oranges	7,903	8,272	7,083	7,218	8,135	
Tangerines	369	372	269	257	308	
Grapefruit	2,541	2,580	1,795	2,046	1,985	
Lemons	712	689	640	655	676	
Citrus, other	52	50	65	58	58	
Total	11,577	11,963	9,852	10,234	11,162	
TOTAL NORTHERN HEMISPHERE						
Oranges	18,451	19,707	19,223	19,666	20,216	
Tangerines	6,020	5,664	5,333	5,546	5,309	
Grapefruit	3,410	3,593	2,729	3,068	2,938	
Lemons	2,511	2,747	2,641	2,563	2,512	
Citrus, other	1,326	1,279	1,367	1,518	1,529	
Total	31,718	32,990	31,293	32,361	32,504	
SOUTHERN HEMISPHERE						
Argentina						
Oranges	650	620	750	640	750	
Tangerines	283	290	250	200	230	
Grapefruit	176	155	190	160	170	
Lemons	517	350	400	570	570	
Total	1,626	1,415	1,590	1,570	1,720	
Australia 2/						
Oranges	394	544	458	483	509	
Tangerines	39	40	43	46	51	
Grapefruit	30	33	26	24	24	
Lemons	35	32	36	35	35	
Total	498	649	563	588	619	

FOOTNOTES AT END OF TABLE

TABLE 23 (Continued)

CITRUS PRODUCTION
(1,000 Metric tons)

	1987/88	1988/89	1989/90	1990/91	1991/92	1/
Brazil						
Oranges	10,400	14,150	12,036	12,360	13,180	
Tangerines 3/	453	570	592	570	605	
Grapefruit	24	25	25	25	25	
Lemons 3/	50	54	53	53	53	
Citrus, other 3/	512	571	592	590	695	
Total	11,439	15,370	13,298	13,598	14,558	
Chile 2/						
Oranges	120	115	115	118	117	
Lemons	80	85	74	72	70	
Total	200	200	189	190	187	
South Africa						
Oranges	681	629	697	678	665	
Grapefruit	134	135	124	132	135	
Lemons	65	61	55	62	63	
Total	880	825	876	872	863	
Uruguay 2/						
Oranges	68	70	82	122	130	
Tangerines	35	37	49	53	66	
Grapefruit	8	8	23	10	11	
Lemons	54	54	51	42	52	
Total	165	169	205	227	259	
TOTAL SOUTHERN HEMISPHERE						
Oranges	12,313	16,128	14,138	14,401	15,351	
Tangerines	810	937	934	869	952	
Grapefruit	372	356	388	351	365	
Lemons	801	636	669	834	843	
Citrus, other	512	571	592	590	695	
Total	14,808	18,628	16,721	17,045	18,206	
GRAND TOTAL						
Oranges	30,764	35,835	33,361	34,067	35,567	
Tangerines	6,830	6,601	6,267	6,415	6,261	
Grapefruit	3,782	3,949	3,117	3,419	3,303	
Lemons	3,312	3,383	3,310	3,397	3,355	
Citrus, other	1,838	1,850	1,959	2,108	2,224	
Total	46,526	51,618	48,014	49,406	50,710	

1/ Crop year refers to the harvest period which usually begins in the fall and extends through the spring.

This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons and limes usually begins earlier and often extends throughout the year.

2/ Estimates previously reported.

3/ State of Sao Paulo only.

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